



# A GUIDE TO MAXIMIZING YOUR TECHNOLOGY INVESTMENTS

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Managed Cloud and IT Services

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# PLAN-DO- CHECK-ACT

## A guide to maximizing your technology investments

Ensuring that you invest in the most effective technology solutions for your business is critical to optimizing your success. However, for many businesses this can be a challenge. This guide outlines a disciplined approach to identifying the technology needed for your business and the necessary steps to ensure the appropriate investment allocation of your organization's technology budget.

Adopting a methodology for the procurement of new technology solutions using the Deming approach, Plan-Do-Check-Act (PDCA), can help you achieve your objectives.



# PLAN

## Plan: Establish objectives and processes required to deliver desired outcomes

In the planning phase, it is critical to recognize opportunities and weaknesses, establish objectives, and identify the processes required to deliver on your objectives.

### Establish Objectives

- ✓ **What are your business objectives? Is your goal to increase sales, expand into new markets, improve customer satisfaction, or improve productivity?** Conduct a Strength, Weaknesses, Opportunities and Threat (SWOT) Analysis. Examine your business strengths that technology can help you capitalize on, identify areas of weakness in delivering customer service, look for opportunities to grow your business and zero in on threats such as security and compliance. Each of these goals may require a different technology solution or set of solutions. A clearly defined set of objectives will help to guide the best investment for your IT dollars.
- ✓ **How old is your technology?** Determine if your technology is hampering your employees' ability to deliver on your business objectives. If legacy systems are preventing you from achieving your strategic goals or hampering your productivity, you may need to invest in updated hardware and/or software to get you back on track. Determining which systems will provide the maximum benefit on your ROI is key in this process.
- ✓ **What are your employees' requirements?** Your employees need the tools necessary to achieve business objectives. Getting your employees engaged early in the discussion of which technology solution will best meet their requirements is key to achieving buy-in and a successful outcome when rolling out company-wide system changes.



# PLAN

- ✓ **Do your employees have the necessary skills?** Often businesses do not have the internal skills necessary to identify and implement new technology solutions. Partnering with a Managed IT Services Professional can be the most cost-effective and expedient route to implementing technology changes.
- ✓ **What are your client/customer needs?** At the end of the day, client or customer satisfaction is every organization's key objective. Client or customer satisfaction studies can help you to determine which areas need updating and where a technology solution can assist your business in providing higher levels of customer satisfaction. The right technology solution can improve client perception of service excellence.
- ✓ **Which tools can be added to your current inventory to improve productivity and decrease costs?** Often the cost of investing in new hardware and software is more than offset by the improvement in productivity. Investing in the right technology solution that is compatible with existing systems can improve client and employee satisfaction, while decreasing costs.
- ✓ **What are the business risks?** Determine which areas of your business are exposed to potential risk, including compliance, data security and disaster recovery. This will help you to identify the tools that your business may be missing to strengthen your IT security to reduce business risks.

## Review Current Technical Environment

At this point the business has confirmed their requirements. Along with the business requirements, your organization's IT strategic plan and assessment of the current technical environment, including hardware, software, applications, and proprietary software being utilized is identified. The result is an inventory of your environment. Based on information gathered items can be identified for replacement.



# PLAN

## Select Technology Solution

Once you have completed an exhaustive review of internal and external requirements and set your objectives, you will begin the process of identifying and selecting the technology solution that best meets your business objectives and identify internal resource requirements to implement these changes. A Managed Cloud and IT Services Provider can help you determine which new or emerging technology solution will best suit your stated objectives.

## Cost Benefit Analysis

In this phase, the client must complete a cost-benefit analysis to determine if the new technology will save their organization time and money and/or increase profitability. This step is critical to moving forward with the recommended technology. Often organizations realize that the options available today provide significant savings when moving away from ineffective or inefficient legacy systems. Increasingly, the Cloud offers clients access to new technologies with little to no capital investments.



# DO

## Do: Implementation of updated technology

Once the technology solution is selected and the project is approved, implementation planning begins.

### Install New Technology Solution

This phase is one of the most critical phases of the transition process. The solution is purchased and the installation and roll-out is initiated. Installation is performed in a production parallel environment so that appropriate testing can take place.

### Application and System Testing

Full application and system testing takes place over a period of time. Business objectives are reviewed to ensure that they are satisfactorily met. System performance is monitored to ensure that processing objectives can be met.

### Implementation

Implementation often takes place over a weekend in order to avoid disruption of service. This is an “all hands-on deck” staged process. Technical staff ensure that the implementation to production is complete. Business personnel test the new system to ensure it is working as designed. Generally, several dry-runs are scheduled before final cut-over to ensure all potential issues are identified in advance. On the day of production migration, final sign-off is received from the business owner.



# Check

## Check: Evaluation of new technology's ability to meet objectives

During the Check phase, data is gathered from the Do phase and evaluated to determine if the objectives are being met and/or if positive trends have been established. Evaluation of identified business objectives take on quantitative measurements to evaluate the success of the new technology to achieve stated goals.

In essence, this audit of your plan's execution will determine the success of your implementation.

- ✓ Is the new technology meeting your business objectives – increased sales, decreased costs, improved customer satisfaction, improved employee productivity, etc.?
- ✓ Is the new technology meeting client and employee needs based on predetermined measurements – increased customer satisfaction, increased productivity, etc.?
- ✓ Is the new technology mitigating business risks?



# Act

## Act: Course correction to ensure issues are addressed and objectives are met

You now have a new process that has been tested and implemented. In this phase, you identify areas where the process can be improved, detect any issues that need to be corrected, and make adjustments to move forward with an improved process.

- ✓ Who has ownership over ensuring the process is continually improved and objectives are met?
- ✓ How do you identify the changes that can be made to improve the newly implemented process?
- ✓ What communication processes are in place to ensure all stakeholders can contribute recommendations for continuous improvement?

Businesses face the challenge of keeping up with new IT developments to stay competitive. Given the right knowledge, information technology has the ability to give you a competitive edge and help to reduce capital and operating costs. However, keeping up with technological advancements is a full-time job and you are focused on your business. Cover-All has skilled Cloud and IT experts with the breadth and depth of knowledge in virtually every technological field to help your organization realize the benefits of technological advancements.

Our specialized staff will work with you to uncover potential opportunities to improve your business processes and at the same time reduce IT capital and operating costs. We have decades of experience working with FP200 companies and small to medium sized businesses alike.

# Call us today!

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If you have a project on the horizon, Cover-All's highly skilled technical staff have extensive experience in all areas of strategic project planning, management, and execution to help you achieve your goals.

*Cover-All Managed Cloud and IT Services is a Managed Services Provider (MSP) providing cost effective solutions for Managed Cloud, Managed IT, Co-Location, Backup & Recovery/DR, and IT Consulting Services.*

*For more information regarding our services, please contact Cover-All at 1-833-268-3788 or visit our website at [www.msp.cover-all.ca](http://www.msp.cover-all.ca)*

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