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## **<CustomerName> Site Analysis**

Version <#>

Customized for <CustomerName> by <Company Name/Logo>

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# Introduction

*In this section, you should write a brief description of your intention for the document. This is where you build rapport.*

When we arrived onsite to begin our assessment for the possible <describe project>, we believed that the task in front of us would be comparable to the many other transitions and similar issues we have dealt with in the past. Very quickly it became apparent that the challenges facing us were significantly different from a traditional transition.

Our expectations were that we would find a <x type of company> typical in structure and operational style to the other <x type of companies> we work with. Instead, what we found was a very dynamic, highly focused group of people accomplishing significant work in spite of lacking some key technology resources.

As we began to interview the staff, we quickly realized that we were facing issues that were not apparent from our conversations prior to the trip. The essence of what we discovered is that <companyname> is responsible for managing an enormous amount of information. We also found that the initial technical troubles with email were not limited to just the owner, but were issues throughout the company to varying degrees.

We determined that in addition to the basic tools we had in mind for the transition, we would also need to address the following key items, among others:

*<List basic trouble areas here>*

- \* Document management system in order to have a single repository for fast, searchable access to the hundreds of thousands of documents handled by the agency;
- \* Access to historical data;
- \* Long term email archiving;
- \* Off-site backups;

The plan we have put together is designed to provide <CustomerName> with what we believe to be the optimal equipment and software to deliver the best possible end user experience. We have designed this so that <CustomerName> can not only continue to be the giant in the <field> world, but become even more efficient at doing this work in the future.

Our philosophy at <Your Company Name Here> is that the technology should never stand in the way of getting the work done. We believe these tools should be something that one uses, but never notices because they do the work that needs to be done, in the manner it needs to be done. It is with that philosophy that we have prepared this proposal for <CustomerName>.

We would like to thank you for the opportunity to work with all of the team at <CustomerName>. It is a wonderful group of people from top to bottom, and we are looking forward to working with you for many years to come.

Sincerely,

<Your Signature>

## **1.0 Company Information**

- 1.01 Company Name**  
<CustomerName>
- 1.02 Physical Location(s)**
- 1.03 Administrative Point of Contact**
- 1.04 Technical Point of Contact**
- 1.05 Emergency Point of Contact**
- 1.06 Company services/product**

## **2.0 Network**

- 2.01 Internet Service Provider**
- 2.02 Type of Service**
- 2.03 Router(s)**
- 2.04 Switches**
- 2.05 Remote Access Capabilities**
- 2.06 Printer Configurations**

## **3.0 Current Systems & Software**

- 3.01 Asset Information**  
*List Current Assets below*
  - 3.01.1 Workstations**
  - 3.01.2 Applications**
  - 3.01.3 Servers**
- 3.02 Cloud Services**
- 3.03 Specialized Equipment or Integration**

## **4.0 Current System Management Policies**

- 4.01 Hardware Deployment Methodology**
- 4.02 Software Deployment**
- 4.03 Directory Services**
- 4.04 Computers Managed or Unmanaged**
- 4.05 User Account Management**

## **5.0 Current Data Management Policies**

- 5.01 Data Centrally Managed or Locally**  
*A description of what data is located where.*
- 5.02 Hosting Services**  
*Include information such as their domain registrar, email host, website host, other hosting services. Include DNS information.*
- 5.03 Backup Practices and Methodology**
  - 5.03.1 Media or Cloud**
  - 5.03.2 Frequency**
  - 5.03.3 Offsite or Onsite Storage**
- 5.04 Sensitive Data**
  - 5.04.1 Classification**
  - 5.04.2 Who Has Access**

- 5.04.3 Data Location
- 5.04.4 Retention Policy

## 6.0 Security

- 6.01 Internet Security
  - 6.01.1 Anti-virus Software
  - 6.01.2 Anti-Spyware/Anti-Malware Software
  - 6.01.3 Password Management
  - 6.01.4 Multi-factor Authentication
  - 6.01.5 Email Anti-Phishing
- 6.02 Workstation Firewall
- 6.03 Wireless Network
- 6.04 Hardware Security

## 7.0 Client Challenges

*Outline the client's known and unknown challenges in each of these areas. Back up your statements with evidence.*

### 7.01 Data Management:

*<Examples - replace with your own findings>*

- 7.01.1 No central repository of data
- 7.01.2 Multiple databases containing different data for different purposes. Only the owners of these databases are aware of what's contained in them. There is no consistency of database tools used to create and maintain the databases.
- 7.01.3 There are no data retention policies.
- 7.01.4 There is no backup procedure in place for client computers.
- 7.01.5 Data is at risk because there are no policies and procedures in place for virus and spyware scanning and removal.

### 7.02 Email management

- 7.02.1 There is no security/encryption when sending email.
- 7.02.2 There are no email retention policies in place.
- 7.02.3 The on-premises servers are high maintenance and subject to security vulnerabilities.

### 7.03 Billing:

- 7.02.1 Employees track time irregularly and often from memory, using Excel spreadsheets or handwritten notes which are then handed to the person in charge of billing.
- 7.02.2 Time tracking tools are necessary for on-the-fly timekeeping.

## 8.0 Recommendations

**EXAMPLE TEXT:** Based on our findings, we have concluded that the full transition to the new systems will be best accomplished in two separate phases. The technology needs are substantial in both phases, and while it could be accomplished in one very long, extended pass, we feel it is vital that the staff have time to adjust to the changes in smaller pieces.

To do all of this at once and have the staff try to absorb so much material in such a short span of time will result in a great deal of frustration and confusion. It will be much more effective and efficient to do the platform transition first, followed a few weeks later by the implementation of the document management system.

### Phase I

- 1) Replace the computers.
- 2) Replace the directory services.
- 3) initiate email archiving.
- 4) Implement MFA.
- 5) Institute a comprehensive and secure data backup plan.
- 9) Install new time tracking software for staff.

1) User training.

Phase 2

- 1) Install, configure and train on the document management system.
- 2) Create custom workflows.
- 3) Replace network equipment.

## Appendix A – Hardware

*Add justification here so the client understands why you chose to recommend this particular equipment.*

Our goal in configuring the new computing environment was to give maximum performance, security, reliability, ease of use and longer usable lifespan of equipment. Items are grouped by the task they are to perform in the new environment.

### Staff Workstations

#### ***iMac <specs>***

For <insert users or job function here>

Total units:

#### ***Macbook Pro <specs>***

For <insert users or job function here>

Total units:

#### ***Macbook Air <specs>***

For <insert users or job function here>

Total units:

#### ***iPad <specs>***

For <insert users or job function here>

Total units:

# Appendix B – Software

*App Store:*

*Specialty Software:*



## **Appendix C - Hardware & Software Pricing**

### **Phase I:**

Hardware:

Provider A: \$

Provider B: \$

Software:

Provider C: \$

Provider D: \$

### **Phase 2:**

Hardware:

Provider E: \$

Provider F: \$

Software:

Provider C: \$

Provider D: \$

## **Appendix D - Labor**

### **Phase 1:**

One full 7-day week, 2 personnel including a weekend.

Set rough schedule here:

Wednesday: Set up MDM and DaaS. Test 2 computers and 2 iPads.

Thursday: Deploy computers. Training for employees..

Friday: Migrate email.

Saturday/Sunday: Monitor email migration. Data transfer.

Monday: Set up backups. Training and troubleshooting.

Price: \$xxxx/day/person with a x-hour cap per day. Hours over x in any day will be billed at \$xxx/hour/person.

Expenses will be billed separately.

Estimated Cost \$123456 plus expenses

### **Phase 2:**

x days for x person(s) at \$xxxx/day for installation & configuration of network.

If additional days are needed they'll be billed at our day rate of \$xxxx/day plus expenses.

Estimated Cost: \$123456 plus expenses