STRATEGIC

	Outsourced	Internal
vCIO – Overall Technology Planning		
High Level Department Wide Functions		

Vision/Mission of IT Department
- Example: To have more scalable, responsive, lower risk, and overall more capable IT systems department to support the company's growth objectives.
- Depending on the functional level of the organization, the mission and vision of the IT department may be as simple as, "bringing technology up to standards/compliance and educating leadership and other co-workers on digital transformation."

Strategic Planning*
- Aligned with the mission and vision of the IT department but must be aligned with the goals and priorities of the business.

Establish Staffing Model
- Insourced vs. Outsourced – determine exact roles and responsibilities.
- Understand and identify the roles other departments play in IT (power users, product champions, etc.)

Budgeting, Purchasing, and Procurement
- Aligned with the goals and objectives
- Includes maintenance and break/fix purchasing

STRATEGIC (Cont'd)

	Outsourced	Internal

Leadership Support/IT Advocacy/Digital Culture Champions

Process/Workflow
- Overall documentation of risk management and standard operating procedures.
- Ticketing and reporting systems

Functional Areas (generalist view)

Systems/Infrastructure (IT, Voice, Copy/Print)
- Asset management
- 5-year infrastructure planning
- Disaster recovery/preparedness
- Work from home/telework strategy
- LOB and other application support
- Licenses, warranties, and other renewals
- Canned software packages (Adobe, Microsoft, etc.)
- Communications analysis
    o Voice/internet contract evaluation

Applications
- Line of business/core application analysis and roadmap. (must meet business objectives and goals)
- Training and utilization plans
- Integrations
- Licenses, warranties, and other renewals

Compliance/Risk
- Policy and procedure
- Audits and management plans
- Insurance, including cyber risk
- Training and security awareness

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STRATEGIC (Cont'd)

Outsourced   **Internal**

Project Implementation, Management, and
Vendor Liaison
- Quarterback/project management for any large application changes (working with FTE and vendors)
- Server based implementation and changes
- Large lifecycle implementation and changes
- Telecommunications

TACTICAL SYSTEMS/INFRASTRUCTURE TASKS

	Outsourced	Internal
"Front of House"/"Front-Office" Day-to-Day Help Desk Support (Remote and Physical)	_____	_____

End User Support and Basic Troubleshooting (Level1)

- Basic hardware support (remote or onsite) – 5-10 min. max.
- Basic application support (remote or onsite): 5-10 min. max. (Example: "I can't launch Word or Excel.")
- Basic telephony support (remote or onsite): 5-10 min. max.

	_____	_____

Escalation Network/Systems Administration (Level 2/3)

- User creation/security modification
- Removing users/offboarding process
- Workstation replacements
- Phone system management
- Video conferencing management
- Chat/instant messaging/Teams
- Paging/faxing
- Peripheral support
- Printer/copier support

	_____	_____

"Back of House"/"Back Office" Day-to-Day support (remote and physical)

- Infrastructure management/small changes (LAN/WAN/WIFI/VPN/MDM)
- Maintenance (servers an workstations)
- Monitoring/alerting
- Backup management
- Patch management
- Security/threat management/cybersecurity
- Updating documentation/change management

	_____	_____

APPLICATION TASKS

	Outsourced	Internal

Line of Business Application Support/Training
- Examples: This report won't run. I get an error when I create an order or make an invoice.

Documentation
- Development of standard operating procedures

Systems Administration and Maintenance
- End user security, parameters, keep the LOB application running

Training (of applications and systems)
- Could be several Product Champions or Power Users
- Job role or process
- Systems training (Tools)
- Basic Windows and overall digital fitness
- Report writing/dashboards

Integrations/Software Development/Advanced Analytics
- Advanced analytics often owned in Finance, but IT assists

Website/Ecommerce Support
- Marketing/social media (if IT has a role here – get them out of it!)
- Backend database and data integrations

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I N C O R P O R A T E D

FACILITIES AND OTHER

	Outsourced	Internal
Life Safety		
• Fire/Burglar Alarms	_____	_____
Access Control		
• Card Access, etc.	_____	_____
DVR/Surveillance/Video	_____	_____
Other IoT		
• HVAC	_____	_____
Vendor Management of Above		
• Policy/procedure as it pertains to risk		
• Part of the systems planning process to minimize vendor overlap	_____	_____