

# White Paper: Creating a simple IT Strategy

## *A decent Strategy in 5 simple steps*

A good IT Strategy can go a long way to helping you control and plan your IT costs, and make the most of emerging technology to adapt and keep agile. Not only that, it shows you want to help your staff work smarter and support their IT needs.

It's amazing how often we find organizations do not have any proactive strategy, but it's also understandable – with no dedicated in-house expertise, it can seem daunting or even unnecessary. But in our experience, those with a strategy have a more reliable and fit for purpose IT estate, and creating a simple strategy need not be time consuming.

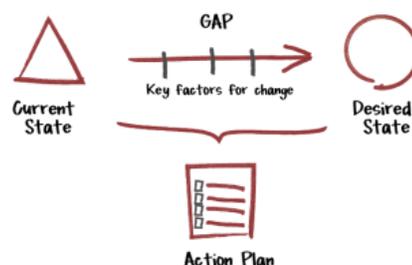
In this paper, we outline 5 simple steps to take to arrive at a lightweight IT Strategy that cover the minimum bases. It's not exhaustive – large organizations might have hundred page documents, but even thinking about these areas will help you plan for future.

### **1. Mind the Gap**

Step 1 is to carry out a short gap analysis to get the lay of the land. Speak to your staff, team leaders, IT Support, people in the field – engage with them to gain a clear picture on what works well and what people find most frustrating with their IT; ultimately, they are your “customers” and best place to provide insight.

People will be negative, and that's fine in this context. Engaging with as many of your staff as you can will get them talking about it, and whilst it's not a shopping list, asking questions such as “what programs or systems have you used at other workplaces that might be of benefit to your job here” is a way to avoid having to reinvent the wheel when you come to planning improvements.

Tools like [SurveyMonkey](https://www.surveymonkey.com) are great for gathering this feedback. Set sufficient time to analyze the responses, spot the trends, and articulate this into the top 5 pain points or wishes that emerge from the data. Prioritize these and then you have the raw inputs to drive your strategy.



## 2. *Turn it off and on again*

The IT Support you use is a critical component of your overall IT estate. There are two ways in which they should be engaged as part of your strategy development:



1. Staff feedback and pinch points on the service should be shared with them in a frank and open way and improvements recorded in the strategy
2. They are best placed to provide you with reports on the types of issues staff are facing, the patterns they see, and make suggestions on possible improvements for the future roadmap

Ask them about [Office 365](#), [Charity Donation Schemes](#), [Remote Working](#), [Backups](#) and Information Security as a minimum. In fact, we wrote a whole paper on getting the most out of your IT Support Provider – have a look [here](#) before you speak to them.

## 3. *I got an iPad for Christmas*

Allowing staff to use their own devices for work can save you a lot of money and keep staff happier using kit they know and love rather than carting around a 5-year-old laptop running Windows XP.

Nowadays, most devices will work with the basic applications you need at work like Email and Microsoft Office, and the practice of “Bring Your Own Device” or [BYOD](#) is well established and accepted as long as they are secured



The key to implementing BYOD in your organization is to have a robust usage policy which staff sign – effectively giving you the right to wipe it – combined with a security system that enforces a PIN or Biometric lock be put on the device to cover your liability in terms of data protection

For the staff policy, there's a great template you can use [here](#), and for the security PIN policy, this can be surprisingly simple to implement if you use Microsoft Windows and/or Office 365 – [speak to us](#) about lightweight, simple and cost effective options for device management without spending thousands

#### **4. I can't afford a new iPad for Christmas**

You'd be amazed how often any sort of budgeting for replacement hardware this gets overlooked, especially in smaller charities. The result? Piecemeal replacement of computers only when old ones get beyond all reasonable repair and turn into sluggish monsters. The lost hours of productivity and IT support costs in this situation is never recorded, but far outweighs a planned replacement – let alone morale, frustration and IT satisfaction of the team!



Hardware budgets and planning need not be too painful. For starters, our advice is do away with desktop PCs. Laptops are far more power efficient, portable if needed, and combined with a simple monitor, keyboard and mouse, give staff a dual screen setup and the freedom to take laptops into meetings or work from home if needed. Simple USB docking stations can allow for monitor, keyboard and mouse to be left at the desk and staff just come in, connect one USB cable and away they go.

Budget-wise, Operating Expenditure of £500 per workstation every 4 years would be a sensible figure; some may cost more, others less, but putting it in forecasts and spending this on laptop replacement each 4 years will help your fleet stay current, and save on the huge upheaval of a “big bang” replacement.

## **5. Lock it down**

Last but not least, you need to implement a simple IT Security policy as part of your overall strategy. Like all these topics, they can be expanded into much more detailed plans of course, but having nothing is unforgivable and your policy does not need to be like a volume of War and Peace!

We've written a whole article on this topic, freely available [here](#), so we would suggest a quick read of that, but as a bare minimum you should put in place policies for:

- Password complexity & expiry
- Removal of old users / ex staff / interns
- Mobile devices – enforcement of complex PINs or Biometrics like thumb prints
- Shared Drives – security groups for who can access what
- A plan for what happens in the event of virus or other security breaches
- Sanity checking the plan each year, possibly via your IT Support company – involve the experts!

### **Further Reading**

For a smaller organisation, having plans in place for these 5 areas would be a great start. For larger bodies, of course this would need expanding. There are a couple of great articles for further reading here:

[http://www.coopsys.net/documents/IT\\_Strategy\\_Made\\_Simple.pdf](http://www.coopsys.net/documents/IT_Strategy_Made_Simple.pdf) and here:

[http://connectingcare.org.uk/files/CC - Developing a Charity ICT Strategy - Dec 15.pdf](http://connectingcare.org.uk/files/CC_-_Developing_a_Charity_ICT_Strategy_-_Dec_15.pdf)

Regardless of what approach you take, remember to keep it as simple as possible, and most importantly of all, revisit it at least twice a year to check progress and make updates.

### **Would you like to discuss any of this further?**

At Ethical IT we are always [here to help](#) with these sorts of subjects too, so don't hesitate to get in touch with us to discuss this – on a personal level or for your organisation – we're all ears. Our Twitter feed also contains regular tips and tricks about these sorts of things, so please follow us [@ethicalituk](#) and for extensive information and help on lots of other common topics, totally free with no sign up or anything else, just head over to our Ethical IT [Knowledgebase](#)