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Table of Contents

Applications Research

Applications Maintenance Research 10
- Application Maintenance: Application Maintenance 10
- Application Maintenance: Quality Assurance, Testing & Deployment 12

Application Management & Governance Research 13
- Application Management & Governance: Application Governance 13
- Application Management & Governance: Application Metrics 14
- Application Management & Governance: Application Service & Performance Management 14
- Application Management & Governance: Project and Portfolio Management 14

Application Selection & Development 15
- Application Selection & Development: Application Development 15
- Application Selection & Development: Requirements Definition 27
- Application Selection & Development: Application Portfolio Management 28
- Application Selection & Development: Quality Assurance, Testing & Deployment 31

Architecture Research 35
- Architecture: Business Architecture, Business Process & Workflow 35
- Architecture: Data Architecture 38

Collaboration & Productivity Applications Research 40
- Collaboration & Productivity Apps: Email & Messaging 40
- Collaboration & Productivity Apps: Worker Collaboration 42
- Collaboration & Productivity Apps: Worker Content Creation 46
- Collaboration & Productivity Applications: Collaboration & Teamware 48
- Collaboration & Productivity Applications: Social Networking/Computing 49

Customer Engagement & Commerce Research 49
- Customer Engagement & Commerce: Customer Engagement Optimization 49

Enterprise Applications Research 50
- Enterprise Applications: Content & Document Management 50
- Enterprise Applications: CRM, Sales, Marketing and Customer Support 51
- Enterprise Applications: ERP Optimization 67
- Enterprise Applications: Human Resource Applications 71
- Enterprise Applications: Sales, Marketing, and Customer Service Applications 73

Information Management Research 73
Information Management: Content & Document Management 73
Information Management: Data Management 83
Information Management: Data Optimization 92
Project Management Office Research 95
Project Management Office: Project Management 95
Project Management Office: Project Portfolio Management 98
Systems Integration Research 102
Systems Integration: Analytics, BI & Reporting 102
Systems Integration: Data Integration & Data Management 107
Systems Integration: Enterprise Integration 107
Systems Integration: Partner Integration 122

Infrastructure Research

Desktop & Mobile Devices Research 122
Desktop & Mobile Devices: Desktop & Mobile Infrastructure 122
Desktop & Mobile Devices: Desktop/Laptop Hardware 122
Desktop & Mobile Devices: Mobile/Handheld Devices 123
Infrastructure Management and Governance Research 124
Infrastructure Management and Governance: Facilities 124
Infrastructure Management and Governance: Infrastructure Costing & Funding 124
Infrastructure Management and Governance: Infrastructure Staffing 125
Infrastructure Research 125
Infrastructure: Asset Management 125
Infrastructure: Availability & Capacity Management 131
Infrastructure: Cloud Strategy 134
Infrastructure: Data Center & Facilities Optimization 135
Infrastructure: Outsourcing & Co-Location 141
Infrastructure: Server Optimization 147
Infrastructure: Storage & Backup Optimization 158
IT Service Management Research 164
IT Service Management: Availability & Performance Management 164
IT Service Management: Configuration Management & CMDB 164
IT Service Management: ITSM/ITIL 165

Network & Communications Research 165
Network & Communications: Desktop & Mobile Management 165
Network & Communications: Network Management 179
Network & Communications: Voice & Video Management 186
Operations Research 191
Operations: Availability & Performance Management 191
Operations: DR and Business Continuity 194
Operations: Manage Budgets & Costs 204
Operations: Service Desk 204
Operations: Service Management 211
Risk Management Research 216
Risk Management: Disaster Recovery Planning 216
Risk Management: Security Policy & Process 217
Security & Risk Management Research 217
Security & Risk Management: Risk Management 217
Security & Risk Management: Security Management 218
Security Research 230
Security: Asset Security 230
Security: Identity Management 232
Security: Network Security 234
Servers and Storage Research 243
Servers and Storage: Server & Storage Virtualization 243
Servers and Storage: Storage 243
Enterprise Networks Research 243
Enterprise Networks: Enterprise WANs 243

Strategy & Leadership Research

Architecture Research 244
Architecture: Application Portfolio Management 244
Architecture: Enterprise Architecture 244
Innovation Research 248
Innovation: Innovation Management 248
Leadership & People Research 252
Leadership & People: IT Organizational Design 252
Leadership & People: Leadership, Culture and Values 256

Leadership & People: Manage Human Resources 259
Leadership & People: People Management 261
Leadership & Performance Management Research 261
Leadership & Performance Management: Demand & Resources Planning 261
Leadership & Performance Management: IT Training 261
Leadership & Performance Management: Knowledge, Intelligence & Behavior Management 262
Leadership & Performance Management: Organizational Design 262
Service Delivery & Management Research 262
Service Delivery & Management: Infrastructure Delivery & Management 262
Service Delivery & Management: Outsourcing 263
Strategy & Governance Research 263
Strategy & Governance: Compliance 263
Strategy & Governance: Governance Framework 265
Strategy & Governance: IT Governance 268
Strategy & Governance: IT Management & Policies 273
Strategy & Governance: IT Strategy & Alignment 273
Strategy & Governance: Policies Definition & Compliance 275
Strategy & Governance: Risk Management 275
Strategy & Governance: Standards Definition & Compliance 281
Strategy & Governance: Strategy & Alignment 281
Value & Performance Research 300
Value & Performance: Benefits & Value Delivery 300
Value & Performance: Manage Budgets & Costs 301
Value & Performance: Manage Business Relationships 305
Value & Performance: Performance Measurement 306
Value & Performance: Program & Project Management 308
Value & Performance: Project Portfolio Management 309
Value & Performance: Service Management 309
Value & Performance: Vendor Management 313
Management & Leadership Research 320
Attract & Select Research 320
Attract & Select: Assessment & Selection 320
Attract & Select: Sourcing & Screening 321
Engage Research 323
Engage: Engagement Strategies 323

Engage: Engagement Surveys 325
Lead Research 326
Lead: High Impact Leadership 326
Lead: Succession Planning 329
Manage & Coach Research 330
Manage & Coach: Coaching 330
Manage & Coach: Management Skills 330
Manage & Coach: Performance Management 332
Train & Develop Research 333
Train & Develop: Employee Development 333
Train & Develop: Onboarding 335
Industry Research 336
Gaming & Hospitality Research 336
Native American Technology 341
Premium Resources 342
Industry Reports 342
IT Governance 343
Business Center Research 343
Business Center: Communications 343
Enterprise IT Center Research 343
Enterprise IT Center: Networks & Servers 343
Industry Center Research 344
Industry Center: Manufacturing 344
Industry Center: Healthcare 344
Industry Center: Financial Services 344
Industry Center: Governance & Non-Profit 344
Strategic Tools Research 345
Strategic Tools: Process Management 345
Strategic Tools: Service & Support 345
Templates & Policies 345
Application Development 345
Budgeting / Procurement 346
Communications 346
Department Governance 346
Desktop Systems 347
Disaster & Continuity 347

Email & Messaging 347
End-User Support 347
Enterprise Applications 348
HR Management 348
Network Management 349
Operating Systems 349
Project Management 349
Security 350
Storage 351
Job Descriptions 351
Application Development 351
Budgeting/Procurement 355
Collaboration 355
Data & Digital Assets 357
Department Governance 359
Desktop Systems 361
Disaster & Continuity 362
E-Mail & Messaging 362
End-User Support 363
Enterprise Applications 364
HR Management 365
Network Management 365
Operating Systems 368
Project Management 368
Security 369
Storage 369
Web Site Development 370
Product Comparisons & Evaluations 370
Customer Relationship Management for Small Enterprises Research 370
Predicting the Future 371

New Research: Spring-Summer 2015

What's New in Applications Research 392
Applications Projects & Technology 392
Systems Integration 392
Enterprise Applications 395
Information Management 396

Collaboration & Productivity Apps 397
Applications Management & Governance 397
Application Selection & Development 397
Project Management Office 399
Architecture 402
What's New in Infrastructure Research 402
Infrastructure Projects & Technology 402
Infrastructure 402
Network & Communications 404
Infrastructure Management & Governance 407
Operations 407
What's New in Security Research 412
Security Projects & Technology 412
Security 412
Security Management & Governance 414
Security & Risk Management 414
What's New in Strategy & Leadership Research 419
Strategy & Leadership Management & Governance 419
Strategy & Governance 419
Architecture 420
Value & Performance 421
Innovation 427
Leadership & People 428
What's New in Industry Research 429
Gaming & Hospitality Research 429
Native American Technology 431
What's New in Predicting the Future 431
Introducing Info-Tech Express 436
Managing Projects 436
Planning IT Strategy 439
Managing IT 439

Icons

	Solution Set
	Storyboard
	Tool
	Template/Policy
	Video
	Job Description
	Case Study
	Note
	Knowledge Base
	Vendor Research
	Podcast
	Premium Research

Applications Research

Applications Maintenance Research

Application Maintenance: Application Maintenance

Type	Document	Description
Blueprint: Optimize the Application Maintenance Strategy		
	Optimize the Application Maintenance Strategy	Application maintenance is critical for ensuring that applications run smoothly and create value for the business. Maintenance must be viewed as more than defect analysis, troubleshooting, and bug fixing. Instead, place greater emphasis on preventative and perfective maintenance. http://www.infotech.com/research/optimize-the-application-maintenance-strategy
	Storyboard: Optimize the Application Maintenance Strategy	Application maintenance is critical for ensuring that applications run smoothly and create value for the business. However, maintenance routinely becomes a resource draining exercise that IT executes in a reactive rather than proactive manner. http://www.infotech.com/research/storyboard-optimize-the-application-maintenance-strategy
	Application Maintenance Maturity Assessment	The Application Maintenance Maturity Assessment and Heat Map Tool is designed to help your organization identify your level of readiness to improve your application maintenance process. http://www.infotech.com/research/application-maintenance-maturity-assessment
	Application Maintenance Change Management Board Charter	Use this template to organize the project so that you can make effective resource allocation decisions, lay the foundation for all subsequent changes to project planning, and prepare one of the most critical communication components for the entire project. http://www.infotech.com/research/application-maintenance-change-management-board-charter
	Application Maintenance Communication Plan	Construct a formal communication plan to engage stakeholders through structured channels. http://www.infotech.com/research/application-maintenance-communication-plan
	Application Maintenance Project Charter	This template should be used as a living document to carry the project through from proof-of-concept to implementation. http://www.infotech.com/research/application-maintenance-project-charter
	Application Maintenance Stage Gate Assessment	This stage gate checklist allows the IT department to determine if it is ready to take on the task of improving its application maintenance processes. http://www.infotech.com/research/application-maintenance-stage-gate-assessment
	Application Maintenance Strategy Project Workbook	This workbook contains a series of exercises for recording key decisions in executing an application maintenance strategy project. http://www.infotech.com/research/application-maintenance-strategy-project-workbook
	Application Maintenance Visual SOP Intake Template	A Standard Operating Procedure (SOP) is an essential component in making sure all operational stakeholders execute a consistent process for application maintenance estimation. http://www.infotech.com/research/application-maintenance-visual-sop-intake-template

	Target State Maintenance Workflow	Build out a complete business process diagram for your current application maintenance process. http://www.infotech.com/research/target-state-maintenance-workflow
	Application Maintenance Business Analyst	The Application Maintenance Business Analyst's role is to elicit, analyze, specify, and validate the maintenance-related business needs of stakeholders, be they customers or end users of applications. http://www.infotech.com/research/application-maintenance-business-analyst
Blueprint: Build an Application Rationalization Strategy, Road Map, and Business Case		
	Build an Application Rationalization Strategy, Road Map, and Business Case	This project Blueprint will walk you step by step through the creation of a road map centered around consolidation of enterprise applications. It will help you to determine parameters surrounding strategic importance and quality and to have stakeholder support for rationalization efforts. In doing so, IT's focus will be on lowering maintenance costs and freeing up valuable resources for innovation efforts. http://www.infotech.com/research/build-an-application-rationalization-strategy-road-map-and-business-case
Blueprint: Create a Robust Plan for Application Maintenance		
	Create a Robust Plan for Application Maintenance	This new Guided Implementation Blueprint will be designed to walk an applications director through the complete process of developing a set of operating procedures for application maintenance. Breakdowns in proper maintenance are a sure-fire way to tarnish IT's reputation with the business. Savvy managers step back and take an approach to fixing things before they break â€“ putting in place a concrete strategy for application maintenance is a critical for keeping things on the rails. http://www.infotech.com/research/create-a-robust-plan-for-application-maintenance
Vendor Landscape: Legacy Software Modernization		
	Vendor Landscape: Legacy Software Modernization	Automated techniques and tools using an architecture-driven approach have been created and are seeing huge successes causing many legacy owners to take notice and engage one of the included vendors to transform their applications, data, and platforms. http://www.infotech.com/research/vendor-landscape-legacy-software-modernization
	Problem Management Maturity Tool	The enterprise's readiness for ITIL-aligned problem management function depends on the service desk's ability to master more basic service desk functions. Use Info-Tech's Problem Management Maturity Tool to assess your service desk maturity level. http://www.infotech.com/research/problem-management-maturity-tool
Blueprint: Use Metrics for Competitive Advantage		
	Leverage Application Development Metrics to Gauge Progress & Increase Success	Developers tell you everything is on track, but deadlines are still missed, and the number of issues is too high. http://www.infotech.com/research/measuring-application-development-gauging-progress-success
Vendor Landscape: Legacy Software Modernization		
	Vendor Landscape Storyboard: Legacy Software Modernization	Executives around the world, in all sectors of the economy, are being faced with the realization that their legacy systems can no longer be ignored. As the developers responsible for maintaining these technological dinosaurs retire from the workforce, businesses must start acting proactively to modernize their aging systems. http://www.infotech.com/research/it-vendor-landscape-storyboard-legacy-software-modernization

	Legacy Code Modernization Vendor Shortlist Tool	This worksheet allows enterprises to profile their Legacy Code Modernization requirements and generate a rank ordered vendor shortlist from a fixed list of vendors. http://www.infotech.com/research/it-legacy-code-modernization-vendor-shortlist-tool
Additional Resources		
	Internal Service Level Agreement for Application Maintenance	Use this template to define normal application maintenance business hours, after-hours support, priority guidelines, and response times based on priority. http://www.infotech.com/research/it-internal-service-level-agreement-for-application-maintenance
	Application Maintenance Workflow Template	This app maintenance workflow template provides flowcharts for managing defects, upgrades, and patches. Use this document to establish maintenance processes specific to your environment. Having processes is key to stepping out of reactive mode and taking control of app maintenance. http://www.infotech.com/research/it-application-maintenance-workflow-template
	Stop Bleeding Money: Roll Out an Application Maintenance Policy	Failure to properly maintain software assets wastes money and can put the enterprise's reputation at risk if downtime is the result. Implement an application maintenance policy to control and raise the profile of this important, yet often overlooked, responsibility of the IT department. http://www.infotech.com/research/stop-bleeding-money-roll-out-an-application-maintenance-policy
	Application Maintenance: Spend Smarter, Spend Less	Software is the backbone of the modern business world. While conception, design, and implementation phases are all key aspects of the Software Development Lifecycle, maintenance, which occurs over the actual life of the software, is arguably the most important piece. A successful enterprise needs a proactive maintenance team to continually evolve and perfect the software, thus preventing disasters and optimizing IT's maintenance investment. http://www.infotech.com/research/application-maintenance-spend-smarter-spend-less

Application Maintenance: Quality Assurance, Testing & Deployment

Type	Document	Description
Blueprint: Software Testing: In a Cloudy/Mobile World		
	Software Testing: In a Cloudy/Mobile World	This project blueprint will create a system upgrade plan to improve the testing of new and existing applications. It will help you create a business case to identify the cost of technology, training, and process re-engineering against business benefits of better quality, resource utilization, and time available for new projects. http://www.infotech.com/research/software-testing-in-a-cloudy-mobile-world
	Storyboard: Optimize the Current Testing Process for Enterprise Mobile Applications	Businesses realize the perceived value of implementing mobile apps in improving productivity and reach of day-to-day business and IT operations. Thus, the IT organization needs to be well-equipped to test for enterprise mobile apps. http://www.infotech.com/research/storyboard-optimize-the-current-testing-process-for-enterprise-mobile-applications

	Project Planning and Monitoring Tool	The beginning stages of the project are dedicated to working out the details of the project task schedule. Take advantage of this tool to determine and create a detailed project plan outlining how the project will progress. http://www.infotech.com/research/project-planning-and-monitoring-tool

Application Management & Governance Research

Application Management & Governance: Application Governance

Type	Document	Description
Blueprint: Control the Policy Management Lifecycle		
	Control the Policy Management Lifecycle	A set of core IT policies is absolutely necessary to establish transparency and set expectations. http://www.infotech.com/research/control-the-policy-management-lifecycle
	User Acceptance Testing Defect Log Template	Documenting defects during user acceptance testing can aid in quick issue resolution. Use the user acceptance testing defect log to track and record defects are they are uncovered. http://www.infotech.com/research/user-acceptance-testing-defect-log-template
	IT Steering Committees in Municipal Settings	Municipalities, with their myriad of departments and services, must manage competing goals and objectives for IT. IT is a scarce commodity and allocating resources without a unifying business goal is particularly challenging. An IT Steering Committee is essential to effectively ensure that prioritization decisions are made transparently and equitably. http://www.infotech.com/research/it-steering-committees-in-municipal-settings-
	2010: The Year in Review	As we look back at the year that was 2010, it was the economy that had the biggest impact on enterprise IT departments, albeit in a more positive way than it did in 2009. While the purse strings didn't loosen substantially, the move away from cutting to the bone was evident. Beyond the economy, several important mergers and acquisitions, as well as the beginning of big changes in how enterprise IT operates made 2010 a pivotal year. http://www.infotech.com/research/it-2010-the-year-in-review
Additional Resources		
	Best Practices for Reducing IT Cost-to-Serve	Use these notes to apply cost-savings across your department. Discover cost savings in every aspect of your cost-to-serve expenses, and use the guidance and tools below to start reducing costs today. http://www.infotech.com/research/best-practices-for-reducing-it-cost-to-serve
	Negotiation Tips How to Save $ With Vendors	Knowledge is power. Go into your vendor negotiations with these tips and tools in your back pocket. http://www.infotech.com/research/negotiation-tips-how-to-save-with-vendors
	Process Optimization	Stretch your resource dollar by optimizing your IT processes and functions. Learn how with our clear advice and tools. http://www.infotech.com/research/process-optimization

Application Management & Governance: Application Metrics

Type	Document	Description
	Application Development Metrics Guide	Use this guide to understand the pillars of a successful development team, and the correct metrics that will help you measure and improve your success pillars. http://www.infotech.com/research/it-application-development-metrics-guide

Application Management & Governance: Application Service & Performance Management

Type	Document	Description
	End-User Support Cost Reduction Assessment Tool	This tool is designed to help organizations determine their top tactics for cost reduction within the end-user support service area. The tactics provided in this tool are a starting point for organizations seeking to reduce their end-user support service costs. http://www.infotech.com/research/end-user-support-cost-reduction-assessment-tool
	IT Change Management Maturity Tool	Changes to IT applications (or infrastructure) must be managed properly to avoid disrupting the normal operation of the company. Use this tool to assess and enhance the maturity of your current IT change management process. http://www.infotech.com/research/it-change-management-maturity-tool
	How do you manage SaaS apps and vendors, AND keep data secure and confidential?	Manage SaaS applications and vendors without compromising security, and retain an excellent user experience. http://www.infotech.com/research/how-do-you-manage-saas-apps-and-vendors-and-keep-data-secure-and-confidential

Application Management & Governance: Project and Portfolio Management

Type	Document	Description
	Project Issue Log	Issue management is a practical necessity for IT projects. A key element in effectively handling issues is the tracking of issues that arise during a project. Use the Project Issue Log tool to ensure issues don't cause a project derailment. http://www.infotech.com/research/project-issue-log
	Project Management Planning and Monitoring Tool for Small Enterprises	Each project's success depends on the level of planning, tracking, and communication invested by the project manager and their team. Use Info-Tech's "Project Management Planning and Monitoring Tool" to accurately track, analyze, and report a project's progress from start to finish. http://www.infotech.com/research/project-management-planning-and-monitoring-tool-for-small-enterprises
	Project Prioritization Tool	For many organizations, projects in IT environments are a critical part of daily operations. Constrained by budget, time frames, and personnel, IT leaders must carefully select the best projects to align with organizational goals and objectives. Use this tool to help analyze and determine project priorities. http://www.infotech.com/research/project-prioritization-tool
	IT Strategy: Business/IT Alignment	The purpose of Business / IT Alignment is to optimize the value that IT contributes to the enterprise. As such, in order to successfully outline a strategic IT roadmap, it is important to start here. http://www.infotech.com/research/it-strategy-businessit-alignment

Application Selection & Development

Application Selection & Development: Application Development

Type	Document	Description
Blueprint: Grow Agile Beyond the Team into the Enterprise		
	Grow Agile Beyond the Team into the Enterprise	Agile benefits are clearly visible in small collocated project teams. Organizations want to realize more of these benefits on a larger scale by managing and supporting more Agile teams and projects across the organization. But this comes with challenges. http://www.infotech.com/research/grow-agile-beyond-the-team-into-the-enterprise
	Storyboard: Grow Agile Beyond the Team into the Enterprise	Agile is meant to bring change to the organization in order to improve the value of your project and the collaboration among your teams. Tailor your solutions to address your Agile scalability impediments to fit your context. http://www.infotech.com/research/storyboard-grow-agile-beyond-the-team-into-the-enterprise
Blueprint: Optimize the Current Agile Process for Scalability to Prepare for a Wider Rollout		
	Optimize the Current Agile Process for Scalability to Prepare for a Wider Rollout	The goal of your initial Agile pilot was to learn how the process functions in your situation and to find and address impediments. As more sprints were completed, your Agile process was refined to better address the working style of the pilot team. You are now looking to optimize Agile in order to scale it out to multiple teams and projects. http://www.infotech.com/research/optimize-the-current-agile-process-for-scalability-to-prepare-for-a-wider-rollout
	Storyboard: Optimize the Current Agile Process for Scalability to Prepare for a Wider Rollout	Agile is a flexible process that must be molded and shaped to fit the specific context of the project and team. Build on the positive experiences from your previous agile projects and continuously improve and optimize. http://www.infotech.com/research/storyboard-optimize-the-current-agile-process-for-scalability-to-prepare-for-a-wider-rollout
	Agile Team Satisfaction Survey	Gauge the sentiment of your current Agile process and culture from all members of your Agile team. http://www.infotech.com/research/agile-team-satisfaction-survey
	User Story Workbook	Document your collectively accepted user stories before beginning your next sprint. http://www.infotech.com/research/user-story-workbook
	Visual Process Template	Document your workflow visually to make it easier to highlight process errors, bottlenecks, and inefficiencies. http://www.infotech.com/research/visual-process-template
Blueprint: Stay on Top of Today's and Tomorrow's Mobile App Trends		
	Stay on Top of Today's and Tomorrow's Mobile App Trends	The significant growth in mobile technologies (both hardware and software) has opened up many new opportunities for organizations to improve customer engagement and end-user productivity. However, enabling these opportunities comes with challenges especially if organizations do not have a strong development process and supporting technology foundation. http://www.infotech.com/research/stay-on-top-of-today-s-and-tomorrow-s-mobile-app-trends

Type	Document	Description
	Storyboard: Stay on Top of Today's and Tomorrow's Mobile App Trends	Organizations are recognizing and realizing the value mobile is bringing to their business and are continually looking for new opportunities to expand their mobile reach. Remain competitive in your industry by enabling today's trending functionalities in your mobile applications. http://www.infotech.com/research/storyboard-stay-on-top-of-today-s-and-tomorrow-s-mobile-app-trends
	Application Architecture Template	Use this template to document and communicate your target application architecture to stakeholders to facilitate discussion and decision making. http://www.infotech.com/research/application-architecture-template
	Mobile Trend Implementation Action Plan Template	This action plan template is meant to be used in conjunction with the Stay on Top of Today's and Tomorrow's Mobile App Trends blueprint to select and describe the necessary steps to implement and support your trending mobile capabilities. http://www.infotech.com/research/mobile-trend-implementation-action-plan-template
Blueprint: Use DevOps to Respond Faster to End Customers		
	Use DevOps to Respond Faster to End Customers	Organizations are pushing IT teams to develop and deliver applications faster while ensuring the customer experience is well received. DevOps is an approach that addresses this requirement by emphasizing the collaboration between development and operations teams in order to streamline deployment and feedback processes. However, implementing it comes with challenges. http://www.infotech.com/research/use-devops-to-respond-faster-to-end-customers
	Storyboard: Use DevOps to Respond Faster to End Customers	The business is putting significant pressure on development and operations to deliver quickly and create positive user experiences. DevOps is an approach to achieve this objective. http://www.infotech.com/research/storyboard-use-devops-to-respond-faster-to-end-customers
	Visual Process Template	Document your workflow visually to make it easier to highlight process errors, bottlenecks, and inefficiencies. http://www.infotech.com/research/visual-process-template
Blueprint: Automate the SDLC Using the Right Tools		
	Automate the SDLC Using the Right Tools	IT teams are seeing repercussions from manual application development. Automation helps streamline development efforts while maintaining consistency and visibility in the software development life cycle (SDLC). http://www.infotech.com/research/automate-the-sdlc-using-the-right-tools
	Storyboard: Automate the SDLC Using the Right Tools	IT teams are seeing repercussions from manual application development. This is leading to high maintenance costs and low quality products. Automation helps streamline development efforts while maintaining consistency and visibility in the software development life cycle (SDLC). http://www.infotech.com/research/storyboard-automate-the-sdlc-using-the-right-tools
	Automated Application Development Work Breakdown Structure Tool	Enter the details of your automated application development project tasks into this work breakdown structure (WBS) template and note of any risk that you may encounter. http://www.infotech.com/research/automated-application-development-work-breakdown-structure-tool

Type	Document	Description
	Metrics Monitoring Tool	Measure the performance of your applications and tools against defined benchmarks. http://www.infotech.com/research/metrics-monitoring-tool
	Automated Application Development Maturity Assessment	Automated Application Development (AAD) is one approach to help alleviate development pain and satisfy business requirements. Determine if AAD is the right solution for your organization. http://www.infotech.com/research/automated-application-development-maturity-assessment
	Project Charter Template	Develop a project charter document to get formal sign-off authorizing the initiation of your project. http://www.infotech.com/research/project-charter-template
	Application Architecture Template	Use this template to document and communicate your target application architecture to stakeholders to facilitate discussion and decision making. http://www.infotech.com/research/application-architecture-template
	Automated Application Development Requirements Template	After obtaining the high level goals and objectives from the business, gradually break down these requirements into granular, technical requirements. Use this template to document requirements for your automated application development project. http://www.infotech.com/research/automated-application-development-requirements-template
	Automated Application Development Business Case Template	Poorly planned automated application development (AAD) tool implementations undermine the project's return on investment. Build a business case to propose to stakeholders so that you can get the final approvals and get your AAD project running. http://www.infotech.com/research/automated-application-development-business-case-template
	Project Implementation RACI Chart	Organize the roles and responsibilities of your project implementation and operation teams with a responsible, accountable, consulted, and informed (RACI) chart. http://www.infotech.com/research/project-implementation-raci-chart
Blueprint: Choose a Mobile Development Strategy		
	Choose a Mobile Development Strategy	The mobile application industry is seeing immense amounts of innovation. The devices themselves are widespread, and the applications are different for each platform, and form factor. http://www.infotech.com/research/it-choose-a-mobile-development-strategy
	Storyboard: Choose a Mobile Development Strategy	This solution set is aimed at companies who have minimal experience developing a mobile application strategy. One of the goals of this set is to ease the anxiety surrounding mobile application development, and to explain that this process should not be radically different from previous development processes. http://www.infotech.com/research/it-storyboard-choose-a-mobile-development-strategy
	Enterprise Mobile Application Type Assessment Tool	When developing a mobile application, organizations must decide if they want to develop a native application or a web application. This decision is imperative to the mobile application's success. This tool aids organizations in making this decision. http://www.infotech.com/research/it-enterprise-mobile-application-type-assessment-tool

Type	Document	Description
	Mobile Development Readiness Assessment Tool	This tool will help assess if the organization is ready to develop a mobile application. Though the mobile space is ubiquitous, it is imperative that organizations assess their readiness, and current capabilities before embarking on a mobile development project. http://www.infotech.com/research/it-mobile-development-readiness-assessment-tool
Blueprint: Choose the Right Development Platform for Enterprise Mobile Applications		
	Choose the Right Development Platform for Enterprise Mobile Applications	Implementing mobile development on any platform requires analysis of the current technical stack to assess reusability with mobile technologies. Development teams must look for ways to leverage existing toolsets, and mid-tier and back-end support in order to minimize costs and maximize ROI. http://www.infotech.com/research/choose-the-right-development-platform-for-enterprise-mobile-applications
	Storyboard: Choose the Right Development Platform for Enterprise Mobile Applications	Businesses are seeing the perceived value of implementing mobile applications to improve the performance and productivity of day-to-day business and IT operations. As a result, business strategies and objectives are being directed towards mobile and IT needs prepare their front-end interfaces, and mid-tier and back-end infrastructure. http://www.infotech.com/research/storyboard-choose-the-right-development-platform-for-enterprise-mobile-applications
	Automated Application Development Work Breakdown Structure Tool	Enter the details of your automated application development project tasks into this work breakdown structure (WBS) template and note of any risk that you may encounter. http://www.infotech.com/research/automated-application-development-work-breakdown-structure-tool
	Metrics Monitoring Tool	Measure the performance of your applications and tools against defined benchmarks. http://www.infotech.com/research/metrics-monitoring-tool
	Roles and Responsibilities Management Tool	Use this tool to help assess capabilities and allocate resources across application development teams, management, IT, and vendor management areas of your organization. http://www.infotech.com/research/roles-and-responsibilities-management-tool
	Scrum Burndown Tool	This tool is designed to track your points burndown after each day of your sprints. http://www.infotech.com/research/scrum-burndown-tool
	Project Charter Template	Develop a project charter document to get formal sign-off authorizing the initiation of your project. http://www.infotech.com/research/project-charter-template
	Application Architecture Template	Use this template to document and communicate your target application architecture to stakeholders to facilitate discussion and decision making. http://www.infotech.com/research/application-architecture-template
Blueprint: Choose the Right Tools for Big Data Development		
	Choose the Right Tools for Big Data Development	Little focus today is given to big data development tools other than the use of generic programming languages like Java. Use a Hadoop pilot to establish a development tool stack that works for your big data needs and establishes institutional learning. http://www.infotech.com/research/choose-the-right-tools-for-big-data-development

Type	Document	Description
	Storyboard: Choose the Right Tools for Big Data Development	The case for big data is defined by the business' need to process various forms of high volume data at high velocities. Begin your big data implementation with a baseline Hadoop pilot to gather institutional learning and validate the value and usefulness of big data. http://www.infotech.com/research/storyboard-choose-the-right-tools-for-big-data-development
	Big Data Project Plan Tool	Your initial big data rollout is composed of three steps: assessing readiness, building your team and big data stack, and monitoring its performance. This tool will assess your fit for big data, document your big data implementation options, and monitor your rollout's success. http://www.infotech.com/research/big-data-project-plan-tool
	Big Data Business Requirements Template	Use this template to document your requirements for your big data project. After obtaining the high-level goals and objectives from the business, gradually break down these requirements into granular, technical requirements. http://www.infotech.com/research/big-data-business-requirements-template
	Web Redesign Strategy Template	An effective Web redesign strategy is the foundation of a successful redesign effort; however, writing a concise and actionable strategy can be difficult and time consuming. Use this template to jump-start the process, and create an effective redesign strategy that facilitates Web success. http://www.infotech.com/research/web-redesign-strategy-template
	Cloud TCO Comparison Tool	A key advantage of the cloud is that there are no upfront capital costs. There is also a significant time savings, as there is no need to acquire, configure, test, and deploy servers. However, be aware that the cumulative TCO will approach (and potentially surpass) on-site costs. http://www.infotech.com/research/cloud-tco-comparison-tool
Blueprint: Develop a Position on Cloud Platform as a Service		
	Develop a Position on Cloud Platform as a Service	"The Cloud" has become major hype area as cost conscious enterprises explore the potential of renting IT services (infrastructure, applications, development platforms) to save costs over internal provisioning (i.e. buying and maintaining infrastructure). http://www.infotech.com/research/develop-a-position-on-cloud-platform-as-a-service
	Storyboard: Develop a Position on Cloud Platform as a Service	There is real and growing interest in cloud computing despite the overuse and overhype of the term cloud. One of the fastest growing areas of the cloud is cloud-based development. Enterprises of all sizes are evaluating the potential of Platform as a Service for greater speed of deployment and lower costs in service delivery. http://www.infotech.com/research/storyboard-develop-a-position-on-cloud-platform-as-a-service
	Cloud TCO Comparison Tool	A key advantage of the cloud is that there are no upfront capital costs. There is also a significant time savings, as there is no need to acquire, configure, test, and deploy servers. However, be aware that the cumulative TCO will approach (and potentially surpass) on-site costs. http://www.infotech.com/research/cloud-tco-comparison-tool
	PaaS Appropriateness Assessment Tool	Enterprises must take care to assess the right fit of any new technology. Platform as a Service is one such technology that has garnered a lot of interest and excitement, but care should be taken not to move too quickly. http://www.infotech.com/research/paas-appropriateness-assessment-tool

Type	Document	Description
	Platform as a Service Business Plan Template	This template will help you build a business plan for the enterprise as well as document business justifications and cautions for developing in the cloud. http://www.infotech.com/research/platform-as-a-service-business-plan-template
	Why Developers Hate the Cloud	There is real and growing interest in cloud computing despite the overuse and overhype of the term cloud. One of the fastest growing areas of the cloud is cloud-based development. Enterprises of all sizes are evaluating the potential of Platform as a Service for greater speed of deployment and lower costs in service delivery but beware of the impact it may have on your development crew. http://www.infotech.com/research/why-developers-hate-the-cloud
Blueprint: Enter Into Mobile Development Without Confusion and Frustration		
	Enter Into Mobile Development Without Confusion and Frustration	Launching a mobile program can be a daunting and confusing task. If not planned carefully, the end result can become chaotic. By executing a series of key projects, you can launch a mobile program that addresses development, testing, and deployment needs within a business ROI framework. http://www.infotech.com/research/enter-into-mobile-development-without-confusion-and-frustration
	Storyboard: Enter Into Mobile Development Without Confusion and Frustration	Mobile applications are changing traditional assumptions about app development, increasing the need for management awareness and augmenting existing app lifecycles. Prepare for change to reduce chaos and plan for disruptions to your development process now and in the future. http://www.infotech.com/research/storyboard-enter-into-mobile-development-without-confusion-and-frustration
	Mobile Program Tool	Without a properly prepared organization, mobile development can wreak havoc on existing development, testing, and deployment processes. Document and define the required projects to prepare the organization for mobile development. http://www.infotech.com/research/mobile-program-tool
	Project Status Communication Worksheet	Use this worksheet to help you organize your ideas and develop your plan for communicating project status to stakeholders. http://www.infotech.com/research/project-status-communication-worksheet
Blueprint: Implement Agile Practices That Work		
	Implement Agile Practices That Work	Agile enables the flexibility and scalability to accommodate changing requirements and a rapid development environment with transparent communication. Scrum, a frequently adopted process, should be the foundation of your Agile implementation strategy. http://www.infotech.com/research/implement-agile-practices-that-work
	Storyboard: Implement Agile Practices That Work	Only a sliver of today's IT projects are considered on time and on budget, meaning that traditional development methods are not delivering results. Agile alleviates the many pain points brought forth by traditional models by emphasizing collaboration, iterations, prioritization, and continual improvements. http://www.infotech.com/research/storyboard-implement-agile-practices-that-work
	Agile Readiness Assessment Tool	Business strategies and requirements are constantly evolving and teams are having trouble catching up. This tool can be used to build a case for an organizational-wide implementation of Agile with a pilot project to alleviate these pain points. http://www.infotech.com/research/it-agile-readiness-assessment-tool

Type	Document	Description
Blueprint: Increase the Performance of Critical Mobile Applications		
	Increase the Performance of Critical Mobile Applications	App reliability and efficiency are becoming essential to today's business mobile users. Ignoring mobile performance today will lead to low user adoption and costly re-engineering and optimization projects in the future. http://www.infotech.com/research/increase-the-performance-of-critical-mobile-applications
	Storyboard: Increase the Performance of Critical Mobile Applications	Not placing mobile performance as a high priority will lead to a lack of app adoption and a loss of competitive advantage where mobile drives key frontline decisions. Develop an iterative performance optimization strategy to help ensure satisfaction with mandates and requirements. http://www.infotech.com/research/storyboard-increase-the-performance-of-critical-mobile-applications
	Mobile Application Performance Optimization Tool	Make mobile development a priority in development discussions rather than an afterthought. This tool can be used to collect information about the alignment of existing mobile applications with business mandates and technical performance requirements, and facilitate an analysis of possible optimization techniques to fill your performance gaps. http://www.infotech.com/research/mobile-application-performance-optimization-tool
Blueprint: Adopt DevOps to Enhance the Speed and Quality of Code Releases		
	Adopt DevOps to Enhance the Speed and Quality of Code Releases	DevOps helps streamline the deployment of apps by easing deployment churn. It emphasizes communication and collaboration between development and ops teams by reducing the number of gateways and code handover practices. http://www.infotech.com/research/adopt-devops-to-enhance-the-speed-and-quality-of-code-releases
Blueprint: Take an Agile Approach to Optimize and Scale Out Agile to Other Teams		
	Take an Agile Approach to Optimize and Scale Out Agile to Other Teams	Conduct a retrospective of the pilot agile project and create a list of improvements to enhance its fit. Apply lessons learned to other areas of the organization looking to adopt agile. http://www.infotech.com/research/take-an-agile-approach-to-optimize-and-scale-out-agile-to-other-teams
Blueprint: Application Development		
	Application Development	Our Application Development Research is designed to enable you to optimize your application development processes. http://www.infotech.com/research/application-development
Vendor Landscape: Application Lifecycle Management		
	Vendor Landscape: Application Lifecycle Management	With shortening lifecycles release management is critical. Behind proper release management is synchronization of concurrent development, virtual test lab management, and a tie in to business policy and compliance to drive application management decisions. http://www.infotech.com/research/it-vendor-landscape-application-lifecycle-management
	Vendor Landscape Storyboard: Application Lifecycle Management	As development platforms and methodologies diversify, ALM tools must demonstrate strong integration to support the full lifecycle. Understand which tools work best in your environment. http://www.infotech.com/research/it-vendor-landscape-storyboard-application-lifecycle-management

Type	Document	Description
	Application Lifecycle Management Vendor Demo Script	A template that can be used to help the IT department provide vendors with a consistent set of instructions ensuring an objective comparison of ALM product features. http://www.infotech.com/research/application-lifecycle-management-vendor-demo-script
	ALM Vendor Shortlist & Detailed Feature Analysis Tool	This tool allows enterprises to profile their Application Lifecycle Management (ALM) requirements and generate an ordered vendor shortlist from a fixed list of vendors. http://www.infotech.com/research/alm-vendor-shortlist-detailed-feature-analysis-tool
	Application Lifecycle Management Request for Proposal Template	A template that can be used to invite prospective vendors to submit a proposal to supply an Application Lifecycle Management (ALM) solution for your organization. http://www.infotech.com/research/application-lifecycle-management-request-for-proposal-template
Blueprint: Create an Effective Web Redesign Strategy		
	Create an Effective Web Redesign Strategy	Without an effective strategy, most of these business opportunities are lost, project planning is inefficient, and implementation becomes chaotic. Use this solution set to create a Web redesign strategy that prevents implementation pains and deliver huge business impact. http://www.infotech.com/research/create-an-effective-web-redesign-strategy
Blueprint: Drive Web Traffic with Search Engine Optimization		
	Drive Web Traffic with Search Engine Optimization	Use this solution set to focus on the most important elements of SEO, and get started with a program that leverages search engines to drive traffic to your site. http://www.infotech.com/research/drive-web-traffic-with-search-engine-optimization-
Storyboard: Develop a Mobile Application		
	Storyboard: Develop a Mobile Application	Organizations are under greater pressure to engage a growing customer audience that will potentially access, use, and buy products and services via mobile devices. Understand the mobile application market and lifecycle and develop a strategy that will best deliver on business objectives. http://www.infotech.com/research/storyboard-develop-a-mobile-application
	Mobile Application Type Assessment Tool	Organizations are under greater pressure to engage a growing customer audience that will potentially access, use and buy products and services via mobile devices. Use this tool to help determine whether to pursue a native or Web mobile application strategy. http://www.infotech.com/research/mobile-application-type-assessment-tool
	Application Development Case Study of a Large Health Insurance Provider	A health insurance provider that covers nearly 60 million people across all 50 states had high-priority mobile application and portal strategy projects on its agenda. Augmentation of their already mature application design and development process was in order. http://www.infotech.com/research/application-development-case-study-of-a-large-health-insurance-provider
	Application Development Case Study of a Mid-Sized Technology Provider	A home technology company located in the western US sought to improve its application development process. By engaging Info-Tech Research Group for an onsite workshop, the company's development team was able to see their entire application development infrastructure laid out and documented for the very first time. http://www.infotech.com/research/application-development-case-study-of-a-mid-sized-technology-provider

Type	Document	Description
	Online Community Needs Assessment Checklist	To help you isolate your requirements for an online community, download this online community needs assessment checklist from Info-Tech. http://www.infotech.com/research/online-community-needs-assessment-checklist
	Web Site Credibility Checklist	Use Info-Tech's Web site credibility checklist to evaluate your company's Web site as well as those your business partners and competitors. http://www.infotech.com/research/web-site-credibility-checklist
	Building a Better RIA	Understand what type of benefits your business can achieve from adopting an RIA strategy. http://www.infotech.com/research/it-building-a-better-ria
	Develop a Customer-Facing Mobile Application	Organizations are under greater pressure to engage a growing customer audience that will potentially access, use and buy products and services via mobile devices. Understand the mobile application market and lifecycle and develop a strategy that will best deliver on business objectives. http://www.infotech.com/research/develop-a-customer-facing-mobile-application
Blueprint: Optimize Existing Applications for Security in an Untrusted World		
	Optimize Existing Applications for Security in an Untrusted World	An application stack touches the code, data, and network layers. Unfortunately, much of the existing literature focuses on the network layer alone. Our research will help you address these higher levels in light of operating in an untrusted world. http://www.infotech.com/research/optimize-existing-applications-for-security-in-an-untrusted-world
	Storyboard: Optimize Existing Applications for Security in an Untrusted World	An application stack touches the code, data, and network layers. Unfortunately, much of the existing literature focuses on the network layer alone. Our research will help you address these higher levels in light of operating in an untrusted world. http://www.infotech.com/research/storyboard-optimize-existing-applications-for-security-in-an-untrusted-world
	Secure Application Rollout Tool	This tool is designed to enable you to properly assess and manage secure application activities for your organization. http://www.infotech.com/research/secure-application-rollout-tool
Blueprint: Optimize the Application Maintenance Estimation (AME) Process		
	Optimize the Application Maintenance Estimation (AME) Process	Maintenance needs are constantly evolving and IT has a hard time identifying which needs are most important. This blueprint can be used as a systematic approach to employing estimation techniques and surfacing variances in estimation. http://www.infotech.com/research/optimize-the-application-maintenance-estimation-ame-process
	Storyboard: Optimize the Application Maintenance Estimation (AME) Process	App Dev managers are under high pressure to create new, highly complex applications while maintaining legacy applications. Failure to properly estimate maintenance costs leads to a loss of integrity with the business and poor quality development. A balanced parametric or expert approach alleviates the many pain points brought about by relying on a single estimation method. http://www.infotech.com/research/storyboard-optimize-the-application-maintenance-estimation-ame-process
	Application Maintenance Estimation Tool	Maintenance needs are constantly evolving and IT has a hard time identifying which needs are most important. This tool can be used as a systematic approach to employing estimation techniques and surfacing variances in estimation. http://www.infotech.com/research/application-maintenance-estimation-tool

Type	Document	Description
	Application Maintenance Estimation Charter Template	To keep all stakeholders aligned with the Application Maintenance Estimation project, use a charter to document the scope, resources, risk, and before/after road map. http://www.infotech.com/research/application-maintenance-estimation-charter-template
	Application Maintenance Estimation Visual SOP Template	Document your Application Maintenance Estimation Standard Operating Procedures (SOPs) visually to make it easier to determine errors in process flow. http://www.infotech.com/research/application-maintenance-estimation-visual-sop-template
	Application Maintenance Estimation Business Requirements Template	Business Requirements are essential to understand the expectations of the business once optimization is complete. Use this tool to capture those requirements and understand any assumptions. http://www.infotech.com/research/application-maintenance-estimation-business-requirements-template
Blueprint: Reduce Churn and Improve an Existing Software Development Practice		
	Reduce Churn and Improve an Existing Software Development Practice	The business owns all software artifacts as tangible assets. Many development practices focus on improving process as a means of achieving value for the business. The focus should be on artifact value generation defined in terms of reusability and maintainability. http://www.infotech.com/research/reduce-churn-and-improve-an-existing-software-development-practice
	Storyboard: Reduce Churn and Improve an Existing Software Development Practice	The business owns all software artifacts as tangible assets. Many development practices focus on improving process as a means of achieving value for the business. The focus should be on artifact value generation defined in terms of reusability and maintainability. http://www.infotech.com/research/storyboard-reduce-churn-and-improve-an-existing-software-development-practice
	Artifact Value Model	This tool allows organizations to assess their current artifact pain points, determine a future state, and outline the impact analysis of pursuing several alternative techniques to achieve that future state. http://www.infotech.com/research/artifact-value-model
	Project Status Communication Worksheet	Use this worksheet to help you organize your ideas and develop your plan for communicating project status to stakeholders. http://www.infotech.com/research/project-status-communication-worksheet
	Agile Readiness Assessment Tool	Business strategies and requirements are constantly evolving and teams are having trouble catching up. This tool can be used to build a case for an organizational-wide implementation of Agile with a pilot project to alleviate these pain points. http://www.infotech.com/research/it-agile-readiness-assessment-tool
Blueprint: Use PaaS to Decrease Ongoing Application Maintenance Costs		
	Use PaaS to Decrease Ongoing Application Maintenance Costs	Consolidate internal application components using PaaS to help lower ongoing maintenance costs and reduce resource overhead. Conduct detailed analysis to determine which components are suitable for migration to PaaS service offerings and generate a rollout plan. http://www.infotech.com/research/use-paas-to-decrease-ongoing-application-maintenance-costs

Type	Document	Description
	Storyboard: Use PaaS to Decrease Ongoing Application Maintenance Costs	Consolidate internal application components using PaaS to help lower your ongoing maintenance costs and reduce resource overhead. Conduct detailed analysis to determine which components are suitable for migration to PaaS service offerings and generate a rollout plan. http://www.infotech.com/research/storyboard-use-paas-to-decrease-ongoing-application-maintenance-costs
	Platform-as-a-Service Rollout Tool	This tool is designed to enable you to properly assess the rollout of PaaS for your organization. http://www.infotech.com/research/platform-as-a-service-rollout-tool
Vendor Landscape: Application Development Tools		
	Vendor Landscape: Application Development Tools	Business is tight, timelines are tight, and getting more done in less time while staying in touch with the leading trends in software is critical to any business. Using development components and tools helps Developers to stay at the edge of technology, providing responsive solutions for your clients. http://www.infotech.com/research/it-vendor-landscape-application-development-tools
	Vendor Landscape Storyboard: Application Development Tools	Business is tight, timelines are tight, and getting more done in less time while staying in touch with the leading trends in software is critical to any business. Using development components and tools helps developers stay at the edge of technology, providing responsive solutions for your clients. http://www.infotech.com/research/it-vendor-landscape-storyboard-application-development-tools
	Application Development Tools Vendor Shortlist Tool	This worksheet allows enterprises to profile their Application Development Tool requirements and generate a rank-ordered vendor shortlist from a fixed list of vendors. http://www.infotech.com/research/it-application-development-tools-vendor-shortlist-tool
Vendor Landscape: Mobile Enterprise Application Platforms		
	Vendor Landscape: Mobile Enterprise Application Platforms	Info-Tech evaluated 11 competitors in the mobile enterprise application platform (MEAP) market. http://www.infotech.com/research/it-vendor-landscape-mobile-enterprise-application-platforms
	Vendor Landscape Storyboard: Mobile Enterprise Application Platforms	Info-Tech evaluated 11 competitors in the MEAP market. Ensure you make the correct MEAP decision for your enterprise needs. http://www.infotech.com/research/it-vendor-landscape-storyboard-mobile-enterprise-application-platforms
	Mobile Enterprise Application Platform Vendor Shortlist Tool	This tool allows large enterprises to generate a customized shortlist of mobile enterprise application platform (MEAP) vendors based on required capabilities and future requirements for product features, architecture, and usability. http://www.infotech.com/research/it-mobile-enterprise-application-platform-vendor-shortlist-tool

Additional Resources		
	As a professional services firm, how do I manage my development environment from an organizational and methodological perspective?	Learn how to manage application development to focus on consistency and following standard tools, environments, and techniques. http://www.infotech.com/research/it-as-a-professional-services-firm-how-do-i-manage-my-development-environment-from-an-organizational-and-methodological-perspective
	Could you provide more information about Enterprise Search?	An overview of enterprise search. http://www.infotech.com/research/it-could-you-provide-more-information-about-enterprise-search
	What are the pros and cons of fat and thin architectures, and will thin replace fat in the future?	The future of thin client architecture and an overview of the pros and cons for fat vs. thin architectures. http://www.infotech.com/research/what-are-the-pros-and-cons-of-fat-and-thin-architectures-and-will-thin-replace-fat-in-the-future
	Do you have information on SOA and ESB, including vendors and best practices?	The reality is that although SOA (and related technologies) have been around for a number of years, the adoption rate is still fairly small. The reason for that is that it simply doesn't make sense for many businesses. http://www.infotech.com/research/it-do-you-have-information-on-soa-and-esb-including-vendors-and-best-practices
	When looking at app PM methodologies, what considerations should I make?	When we begin to look at project methodologies, best practices for running projects, many businesses are turning to Agile or Agile-like methods in order to find success with the deliverables. http://www.infotech.com/research/when-looking-at-app-pm-methodologies-what-considerations-should-i-make-
	What are some advantages and disadvantages if I am currently considering Application Development Outsourcing?	The advantages and disadvantages of application development outsourcing. http://www.infotech.com/research/what-are-some-advantages-and-disadvantages-if-i-am-currently-considering-application-development-outsourcing
	Quick Wins Save 5% Now!	Do you need to make a difference this week? This month? Take a look at these tactics and tools to build your guerilla plan. http://www.infotech.com/research/quick-wins-save-5-now
	Getting Prepped for Open Source Apps	Using the open-source model for the enterprise application needs of the organization requires careful preparation in terms of process, people, and technology. Follow Info-Tech's recommendations to get the enterprise ready for Open Source Software (OSS) adoption. http://www.infotech.com/research/getting-prepped-for-open-source-apps
	Open Source Apps Projects: Reinforce the Three Pillars	IT managers that attempt to implement Open Source Software (OSS) without adequate planning are setting up the project for failure. Introducing the OSS model into an enterprise requires careful preparation in terms of process, people, and technology. Follow Info-Tech's steps to get the enterprise ready for OSS adoption. http://www.infotech.com/research/open-source-apps-projects-reinforce-the-three-pillars

Application Selection & Development: Requirements Definition

Type	Document	Description
Blueprint: Optimize Requirements Gathering to Effectively Serve the Business		
	Optimize Requirements Gathering to Effectively Serve the Business	Requirements gathering has been a constant bother to many IT managers. Undertaking a systematic effort to optimize requirements gathering standard operating procedures can unlock significant value for procurement and development of enterprise applications. http://www.infotech.com/research/optimize-requirements-gathering-to-effectively-serve-the-business
	Requirements Gathering Case Study of a Large State Agency	The IT department of a large state agency located in the western US suffered from a lack of strategic business alignment and consistent process management in the area of requirements gathering. The agency needed a practical approach to setting priorities, standardizing their processes, and identifying strategies to identify and fill resourcing gaps. http://www.infotech.com/research/requirements-gathering-case-study-of-a-large-state-agency
Blueprint: Optimize Requirements Gathering to Effectively Serve the Business		
	Storyboard: Optimize Requirements Gathering to Effectively Serve the Business	Proper requirements management is a challenge that has plagued IT managers for decades. The cost of poor requirements are not trivial: project overruns, insufficient delivery of business value, and damage to IT's reputation. Use this storyboard to construct a set of standard operating procedures for requirements gathering. http://www.infotech.com/research/storyboard-optimize-requirements-gathering-to-effectively-serve-the-business
	Requirements Management Maturity Assessment Tool	Realize that there is no all-purpose approach for requirements gathering. The proper amount of time and effort that an organization puts towards requirements gathering depends on the complexity and significance of the IT project portfolio. This assessment will identify the optimal approach that an organization should implement when gathering requirements. The tool will also identify and prioritize any performance gaps in your current requirements gathering process. http://www.infotech.com/research/requirements-management-maturity-assessment-tool
	Requirements Traceability Matrix	The Requirements Traceability Matrix is a tool that you use to trace each requirement back to a specific business case, and then forward to the rest of the scope deliverables. Tracking requirements from inception to testing is a critical component of the requirements gathering process. For organizations without a dedicated requirements gathering suite, the Requirements Traceability Matrix can assist with tracking requirements. http://www.infotech.com/research/requirements-traceability-matrix
	Standard Operating Procedures for Requirements Elicitation, Analysis, and Validation	An alarming number of organizations do not have a formal process in place for gathering requirements, and those that do have a very low adherence rate. Having codified standard operating procedures is a critical first step towards optimizing your requirements management efforts. http://www.infotech.com/research/standard-operating-procedures-for-requirements-elicitation-analysis-and-validation

Type	Document	Description
	Requirements Gathering Process Flow Diagram Template	This template will assist organizations in mapping their requirements gathering process. It comes prepopulated with a standard requirements gathering process, but can easily be modified to suit the needs of your organization. http://www.infotech.com/research/requirements-gathering-process-flow-diagram-template

Application Selection & Development: Application Portfolio Management

Type	Document	Description
Blueprint: Use Agile Application Rationalization Instead of Going Big Bang		
	Use Agile Application Rationalization Instead of Going Big Bang	IT organizations experience application sprawl over time caused by many factors which can end up costing more for licenses, operational resources, and maintenance. By reducing the number of applications, organizations can free up resources to focus on additional projects or innovation. http://www.infotech.com/research/use-agile-application-rationalization-instead-of-going-big-bang
	Storyboard: Use Agile Application Rationalization Instead of Going Big Bang	A step-by-step blueprint to help you rationalize applications in Agile fashion, which offers lower risk and faster business value attainment to both the IT organization and the business. http://www.infotech.com/research/storyboard-use-agile-application-rationalization-instead-of-going-big-bang
	Agile Project Charter	A template that is intended to be organic throughout the project. It is a communication document that includes just enough information to keep team members aligned. http://www.infotech.com/research/agile-project-charter
	Application Rationalization Disposition Assessment Tool	An assessment tool to help you document application inventory, map business processes, assess business quality, technical quality, and TCO. http://www.infotech.com/research/application-rationalization-disposition-assessment-tool
	Application Rationalization Impact Analysis Tool	A tool to help you document impact analysis for a given set of dispositions and help support a go/no-go decision on rationalization when coupled with a business value factor. http://www.infotech.com/research/application-rationalization-impact-analysis-tool
Blueprint: Integrate Consumer Applications into IT		
	Integrate Consumer Applications into IT	The influx of consumer devices has brought along a variety of potential security risks through the consumer applications that end users have on their devices. Protect the organizational assets while enabling end-user productivity. http://www.infotech.com/research/it-integrate-consumer-applications-into-it
	Storyboard: Integrate Consumer Applications into IT	The influx of consumer devices has brought along a variety of potential security risks through the consumer applications that end users have on their devices. Protect the organizational assets while enabling end-user productivity. http://www.infotech.com/research/it-storyboard-integrate-consumer-applications-into-it

Type	Document	Description
	Case Study: HHS	The influx of consumer devices has brought along a variety of potential security risks through the consumer applications that end users have on their devices. Hamilton Health Sciences built an application ecosystem that mitigates the risk of these applications while enabling end users to work productively. http://www.infotech.com/research/it-case-study-hhs
	Integrate Consumer Applications	This video introduces the key driver of personal and unmanaged applications (PUAs) and the potential long term application portfolio strategy to integrate these into the enterprise. http://www.infotech.com/research/it-integrate-consumer-applications
	Application Retirement Tool	Determining if or when to retire an application is a difficult proposition. Retirement decisions have a reactionary effect on an enterprise's corporate and technology infrastructure. Using the wrong criteria to determine whether or not to retire an application can disrupt business/IT alignment and shut down critical business processes. http://www.infotech.com/research/application-retirement-tool
Blueprint: Optimize Application Rationalization		
	Optimize Application Rationalization	The objective of this project is to help the member optimize their application portfolio to reduce costs. http://www.infotech.com/research/optimize-application-rationalization
Blueprint: Project Portfolio Management		
	Project Portfolio Management	Our Portfolio Management Research is designed to enable you to make yourself World Class by: breaking down Portfolio Management into digestible steps, providing actionable instructions to complete each step and providing all the strategy tools and templates you need http://www.infotech.com/research/portfolio-management
Blueprint: Understand Hot Trends in Applications		
	Understand Hot Trends in Applications	Trends often represent substantial and potentially disruptive change. Application Managers that choose to follow these trends can significantly improve or possibly damage the organization's competitive position. http://www.infotech.com/research/understand-hot-trends-in-applications
	Storyboard: Understand Hot Trends in Applications	Major trends in Social Computing, Cloud Computing, Rich Internet Applications, and Mobility, are driving businesses quickly towards the future and for those businesses not ready to move with the wave of emerging trends, many are being left in the wake of their competition. http://www.infotech.com/research/storyboard-understand-hot-trends-in-applications
	Business Function and Application Assessment	One of the keys to successful Application Portfolio Management (APM) is mapping business function and business value to applications in inventory. Use this tool to assess the business function and value of enterprise applications. http://www.infotech.com/research/business-function-and-application-assessment

Type	Document	Description
	Portfolio Management Case Study of Mid-Sized Credit Union	The IT spending of a medium-sized credit union with 20 IT staff was inversely proportional to the strategic priorities of the company at large. Aligning spending with strategic goals, and getting the right IT skills and change and project management processes to deliver on alignment, was required to mitigate the pain. The credit union engaged Info-Tech to help them reprioritize its IT project portfolio and assess the supporting processes and skills required as a starting point to better business alignment. http://www.infotech.com/research/portfolio-management-case-study-of-mid-sized-credit-union
	Portfolio Management Case Study of a Large Museum	The Board of Directors and Chief Curator at a well-respected museum on the US east coast saw the need for IT to develop better Project oversight. As each new museum exhibit involved some IT capability, IT had to better manage its resources to supply both new (even last-minute) functionality as well as make progress against legacy maintenance issues. http://www.infotech.com/research/portfolio-management-case-study-of-a-large-museum
	Portfolio Management Case Study for Mid-Sized Education Organization	A leading University making the transition toward becoming a Research Institution had a consistent record of growth which created a supply and demand imbalance between their resources and outputs. http://www.infotech.com/research/it-portfolio-management-case-study-for-mid-sized-education-organization
	Portfolio Management SOP for Retail Company	Fueled by growth, IT faced some large strategic issues and did not have the time to spend on operational initiatives. The organization needed to build a process that looked at the overall portfolio that took both strategic and operational projects into account. http://www.infotech.com/research/it-portfolio-management-sop-for-retail-company
	Info-Tech's Big Six for 2011	Each year there are numerous technology developments that provide IT with opportunities to offer extended value to the organization. Some simplify IT's work. Others are just plain cool. And some create challenges for IT in its traditional role as the custodian of IT decision-making, standards, and delivery. http://www.infotech.com/research/it-info-techs-big-six-for-2011
Blueprint: Optimize Applications Cost Management		
	Optimize Applications Cost Management	The current financial climate is an area of concern for business leaders. While many cost saving strategies have been pursued already, there are still opportunities in this area for applications. The top tactics for cutting costs are zero-based budgeting, and eliminating maintenance from non-core applications. http://www.infotech.com/research/it-optimize-application-cost-management
	Storyboard: Optimize Applications Cost Management	The current financial climate is an area of concern for business leaders. While many cost saving strategies have been pursued already, there are still opportunities in this area for applications. Focus on zero-based budgeting and eliminating maintenance from non-core applications to drive costs out of applications management. http://www.infotech.com/research/storyboard-optimize-application-cost-management
	Case Study: Hosting.com	Outsourcing can be a viable option for enterprises looking to control costs and add value to an area where they might not have in-house expertise. http://www.infotech.com/research/it-case-study-hostingcom

Type	Document	Description
▶	Applications Cost Management	This video introduces some of Info-Tech's new research on controlling application related costs in IT. Applications typically account for about 40% of the enterprise IT budget, therefore it faces a lot of scrutiny from senior management. http://www.infotech.com/research/it-applications-cost-management
Additional Resources		
🗋	Address the Risks Posed by Legacy Applications	As an Applications Development & Maintenance leader, you must address the key challenges facing the role. The effective management of legacy applications is one of those challenges. http://www.infotech.com/research/it-address-the-risks-posed-by-legacy-applications
🗋	Reign in Maintenance Costs with Application Portfolio Management	Application maintenance consumes an enormous portion of enterprise IT budgets and resources. There is often little consideration given to which applications provide real business value and warrant resources and which provide little or no value. Use Application Portfolio Management (APM) to evaluate which enterprise apps deserve precious resources. http://www.infotech.com/research/reign-in-maintenance-costs-with-application-portfolio-management
🗋	Application Portfolio Management: A Nice Handle for App Cost Control	Enterprises spend the majority of application budgets on maintenance. Managing the corporate application portfolio can give organizations insight into which applications are providing value, and which are money pits. Understand Application Portfolio Management (APM) and use it to get the most out of enterprise applications. http://www.infotech.com/research/application-portfolio-management-a-nice-handle-for-app-cost-control

Application Selection & Development: Quality Assurance, Testing & Deployment

Type	Document	Description
Blueprint: Develop a Mature Testing Practice to Produce Better Quality Applications		
⚙	Develop a Mature Testing Practice to Produce Better Quality Applications	IT organizations struggle to implement a properly managed test program which improves the quality of the software. This set will help you assess current test capabilities, build a comprehensive test process and structure to improve effectiveness and efficiency, and map testing to business priorities. http://www.infotech.com/research/develop-a-mature-testing-practice-to-produce-better-quality-applications
🗎	Storyboard: Develop a Mature Testing Practice to Produce Better Quality Applications	Deploying low quality applications is costing organizations money. One cause of this is an immature testing practice. A testing maturity framework is essential to improving application quality. http://www.infotech.com/research/storyboard-develop-a-mature-testing-practice-to-produce-better-quality-applications
✎	Continuous Test Improvement Plan Template	Proposed changes to improve the testing process. http://www.infotech.com/research/continuous-test-improvement-plan-template
✎	Peer Review Report Template	Document that facilitates feedback to testers for improvement. http://www.infotech.com/research/peer-review-report-template
✎	Standard Test Process Repository Template	Document explaining the centralized location for test processes. http://www.infotech.com/research/standard-test-process-repository-template

Type	Document	Description
	Test Analysis Report Template	Identification of metrics for testing. http://www.infotech.com/research/test-analysis-report-template
	Test Evaluation Report Template	Documents the results of a test plan. http://www.infotech.com/research/test-evaluation-report-template
	Test Plan Template	A master template that outlines the execution of a test session. http://www.infotech.com/research/test-plan-template
	Test Procedure Template	Document outlining how testing will be conducted. http://www.infotech.com/research/test-procedure-template
	Test Process Template	Document for determining objectives, responsibilities, and high level processes associated with each test level. Visual process for inclusion into a Test Strategy Document. http://www.infotech.com/research/test-process-template
	Test Strategy Template	Outlines the approach to testing. http://www.infotech.com/research/test-strategy-template
	Visual SOP Template for Test Process	Visual process for outlining the testing process and current pain points. http://www.infotech.com/research/visual-sop-template-for-test-process
Blueprint: Optimize the Current Testing Process for Enterprise Mobile Applications		
	Optimize the Current Testing Process for Enterprise Mobile Applications	Highly distributed mobile applications with various back-end APIs increase the complexity and need for proper testing. Test and development teams need to understand the mobile testing taxonomy and application context to be successful. http://www.infotech.com/research/optimize-the-current-testing-process-for-enterprise-mobile-applications
	Test Requirements Tool	Use this template to translate your target state testing processes for mobile into requirements for your RFP. http://www.infotech.com/research/test-requirements-tool
	Visual SOP Template for Application Testing	Use flowcharts and swim lane diagrams to create effective visual SOP documents. http://www.infotech.com/research/visual-sop-template-for-application-testing
	Mobile Testing Project Charter Template	Develop a project charter to gain management approval for conducting your project. http://www.infotech.com/research/mobile-testing-project-charter-template
Blueprint: Develop a Cloud Testing Strategy for Today's Apps		
	Develop a Cloud Testing Strategy for Today's Apps	Cloud testing will amplify traditional testing practices and open the door to a higher level of software testing. A formal, standardized, and documented strategy is needed to realize the full potential of cloud testing. http://www.infotech.com/research/it-develop-a-cloud-testing-strategy-for-todays-apps
	Storyboard: Develop a Cloud Testing Strategy for Today's Apps	Cloud testing will amplify traditional testing practices and bring a higher level of software testing. A formal, standardized, and documented strategy is needed to realize the full potential of cloud testing. http://www.infotech.com/research/it-storyboard-develop-a-cloud-testing-strategy-for-todays-apps
	Cloud Testing Readiness Assessment Tool	Cloud testing is an invaluable approach for enhancing the performance of certain testing practices and optimizing established testing and development processes, but some organizations are in a better position to fully leverage cloud testing. http://www.infotech.com/research/it-cloud-testing-readiness-assessment-tool

Type	Document	Description
	Cloud Testing Project Planning and Monitoring Tool	IT leaders tasked with implementing cloud testing projects can experience resourcing and budgeting issues in later stages if initial planning, design, and requirements are not properly outlined. Start the project off right by planning and monitoring the cloud testing project. http://www.infotech.com/research/it-cloud-testing-project-planning-and-monitoring-tool
	Create a Formal Cloud Testing Strategy	Organizations are finding it difficult to execute test cases of cloud and web applications with traditional testing methods. Cloud testing augments these practices and achieves a higher level of software testing. http://www.infotech.com/research/it-video-develop-a-cloud-testing-strategy-for-todays-apps
Vendor Landscape: Software Testing Solutions		
	Vendor Landscape: Software Testing Solutions	Mobile and cloud testing continue to mature with an emphasis on greater accuracy in testing as supported through virtualization and automation. Test results are now fed directly into business decision-making vectors for compliance and application risk management. http://www.infotech.com/research/it-vendor-landscape-software-test-management
	Software Testing Solution RFP Template	Use this template to invite prospective vendors to submit a proposal to supply a software testing solution for your organization. http://www.infotech.com/research/software-testing-solution-rfp-template
	Software Testing Vendor Demo Script	Use this template to help the IT department provide vendors with a consistent set of instructions ensuring an objective comparison of software testing product features. http://www.infotech.com/research/software-testing-vendor-demo-script
	Software Testing Vendor Shortlist & Detailed Feature Analysis Tool	This worksheet allows enterprises to profile their software testing requirements and generate a rank-ordered vendor shortlist from a fixed list of vendors. http://www.infotech.com/research/software-testing-vendor-shortlist-detailed-feature-analysis-tool
Blueprint: Assess the Appropriateness of Automated Functional Testing		
	Assess the Appropriateness of Automated Functional Testing	Automating functional testing can improve software quality for the right shop. http://www.infotech.com/research/assess-the-appropriateness-of-automated-functional-testing
Vendor Landscape Storyboard: Software Test Management		
	Vendor Landscape Storyboard: Software Test Management	As software complexity grows and test cycles shrink, the risk of untested code greatly increases. http://www.infotech.com/research/it-vendor-landscape-storyboard-software-test-management
	Software Test Management Vendor Shortlist Tool	Info-Tech conducted a market evaluation of eight leading Software Test Management (STM) solutions. Use this tool to narrow the vendors to a shortlist of solutions that best satisfy the company's requirements, before sitting down with dealers and scheduling vendor demonstrations. http://www.infotech.com/research/it-software-test-management-vendor-shortlist-tool

Type	Document	Description
	Use Case and Test Case Matrix	QA testers rely on test cases that are both detailed and easy to follow in order to accomplish application testing successfully. Save time and effort by leveraging use case scenarios as valuable test case input. Use Info-Tech's "Use Case and Test Case Matrix" to map test cases back to a specific use case (or cases) for tracking purposes. http://www.infotech.com/research/use-case-and-test-case-matrix
	Informal Usability Test Plan	Usability benefits can be gained without going to the full extent of formal usability testing. Use this "Informal Usability Test Plan" template to communicate the purpose of the testing process and what will be accomplished during the test sessions. http://www.infotech.com/research/informal-usability-test-plan
	Usability Testing Task Results	Once you have defined the tasks for usability test participants to complete in the "Informal Usability Test Plan," use the "Usability Testing Task Results" template to document the results. http://www.infotech.com/research/usability-testing-task-results
	Functional Test Plan Template	This tool provides an outline to aid the development of a functional test plan for a software application. http://www.infotech.com/research/functional-test-plan-template
	Functional Test Results Template	This tool provides a template for tracking functional test results. http://www.infotech.com/research/functional-test-results-template
	User Acceptance Test Checklist	Use this checklist to help you control and manage the user acceptance testing process. http://www.infotech.com/research/user-acceptance-test-checklist
	Functional Testing Software Evaluation Form	Scoring vendor solutions solely based on their presentations or marketing material provides only a limited picture of a software solution. Due diligence must be performed in order to verify vendor claims. Use this tool as a scoring guide for trial software evaluation, and reference checks to validate vendor claims and select an appropriate testing software solution. http://www.infotech.com/research/functional-testing-software-evaluation-form
Vendor Landscape: Software Testing Solutions		
	Vendor Landscape Storyboard: Software Testing Solutions	Software testing tools range from simple to sophisticated suites. Choose wisely to ensure that you make the best choice for your development team. http://www.infotech.com/research/it-vendor-landscape-storyboard-software-testing-solutions
Additional Resources		
	Software Testing Strategy and Risk Assessment	With finite resources and infinite testing possibilities, software testing must be driven by a strategy unique to the project and application environment. Use this tool to identify risks and the qualities that will determine the types of testing objectives and the degree to which they should be pursued in the testing strategy for the project. http://www.infotech.com/research/software-testing-strategy-and-risk-assessment
	Testing Checklist	Testing of any software application is a critical component of the life cycle. If testing is not done with sufficient coverage, a substandard product may be deployed. http://www.infotech.com/research/testing-checklist

Type	Document	Description
	Defect Reporting Template	Communication between testers and developers is essential to the testing process. Use this template to track and report defects so developers can fix bugs discovered in the testing process. http://www.infotech.com/research/defect-reporting-template
	Test Plan Template	Testing is typically limited by time and budget so testers and developers must use testing time wisely. Use this template to document what should be tested, by whom and to what degree. http://www.infotech.com/research/test-plan-template
	Can you estimate usage for performance testing applications?	This FAQ will give advice around creating real-world production scenarios and the considerations that must be taken to come up with an accurate calculation. http://www.infotech.com/research/it-can-you-estimate-usage-for-performance-testing-applications
	Usability Testing on the Cheap	Usability testing has proven to be effective regardless of the formality of the process. Do not omit usability testing because of its cost; instead, conduct semiformal usability testing to get fast and inexpensive results. http://www.infotech.com/research/usability-testing-on-the-cheap

Architecture Research

Architecture: Business Architecture, Business Process & Workflow

Type	Document	Description
Blueprint: Create a Comprehensive BPM Strategy for Successful Process Automation		
	Create a Comprehensive BPM Strategy for Successful Process Automation	A BPM Strategy and Roadmap will provide an opportunity to overcome these gaps by assisting the organization in identifying the most appropriate class of tools and particular initiatives to support with automation. http://www.infotech.com/research/create-a-comprehensive-bpm-strategy-for-successful-process-automation
	Storyboard: Create a Comprehensive BPM Strategy for Successful Process Automation	Creating a BPM strategy is a multi-step process. After identifying gaps, prioritize the initiatives through the use of a comprehensive roadmap. A critical aspect of the BPM automation strategy will involve selling the benefits, gaining buy-in, and obtaining implementation approval. http://www.infotech.com/research/storyboard-create-a-comprehensive-bpm-strategy-for-successful-process-automation
	BPM Center of Excellence Charter Template	Adopt or adapt responsibilities of a Business Process Management (BPM) Center of Excellence. A charter is an essential document for defining a committee's purpose, agenda, mandate, and membership. http://www.infotech.com/research/bpm-center-of-excellence-charter-template
	BPM Communication Planning Template	This tool is designed to help track and define the communication methods needed to introduce initiatives and change to the organization. http://www.infotech.com/research/bpm-communication-planning-template
	BPM Maturity and Gap Assessment Tool	This tool will help you assess your current capabilities and highlight initiatives to improve maturity. Working to increase maturity will allow you to successfully automate processes with less hurdles. http://www.infotech.com/research/bpm-maturity-and-gap-assessment-tool

Type	Document	Description
	BPM Process Appropriateness Assessment	The BPM Process Appropriateness Assessment is designed to help you identify processes that are good candidates for BPM automation. http://www.infotech.com/research/bpm-process-appropriateness-assessment
	BPM Stakeholder Interview Guide	This stakeholder interview guide is used to conduct structured interviews with any process stakeholders. This may include process owners or end users. The interview guide will allow the project sponsor to extract the right information to assess processes for automation. http://www.infotech.com/research/bpm-stakeholder-interview-guide
	BPM Stakeholder Presentation	This editable PowerPoint presentation will help you gather the right information to present to stakeholders and gain approval to move forward with implementing the strategy. http://www.infotech.com/research/bpm-stakeholder-presentation
	BPM Strategic Roadmap	This template will help build a living Business Process Management (BPM) strategic roadmap for the enterprise. http://www.infotech.com/research/bpm-strategic-roadmap
	BPM Strategy and Roadmap Project Charter Template	This template will help to effectively and efficiently communicate key information to stakeholders and participants regarding the BPM project goals, objectives, and roles and responsibilities. By successfully conveying the right information, you will receive stakeholder buy-in and approval to proceed with the development of the strategy. http://www.infotech.com/research/bpm-strategy-and-roadmap-project-charter-template
	BPM Total Cost of Ownership Calculator	This tool is designed to help your organization assess the total cost of ownership for a five-year plan. This tool will help you understand the costs associated with BPM and identify the considerations to make when enumerating BPM benefits. http://www.infotech.com/research/bpm-total-cost-of-ownership-calculator
Blueprint: Select and Implement the Right BPM Solution for the Organization		
	Select and Implement the Right BPM Solution for the Organization	Business process management (BPM) technology is a mature and dynamic market, with a landscape full of vendors with cutting edge solutions and diverse offerings. Identify your business and IT objectives for your desired BPM suite through a rigorous and comprehensive requirements gathering process. Objectively evaluate vendors and select a BPM solution that suits your organization's process automation needs. http://www.infotech.com/research/select-and-implement-the-right-bpm-solution-for-the-organization
	Storyboard: Launch the BPM Selection Project	In order for your business to successfully leverage BPM technology, proper project planning and stakeholder engagement must occur at the beginning of the project. Follow the guidance of this phase to support your planning and the launch of your BPM procurement project. http://www.infotech.com/research/storyboard-launch-the-bpm-selection-project

Type	Document	Description
	Storyboard Overview: Select and Implement the Right BPM Solution for the Organization	Business process management (BPM) technology is a mature and dynamic market, with a landscape full of vendors with cutting edge solutions and diverse offerings. Identify your business and IT objectives for your desired BPM suite through a rigorous and comprehensive requirements gathering process. Objectively evaluate vendors and select a BPM solution that suits your organization's process automation needs. http://www.infotech.com/research/storyboard-overview-select-and-implement-the-right-bpm-solution-for-the-organization
	Storyboard: Plan the BPM Implementation	Even a solution that is a perfect fit for an organization will fail to generate value if it is not properly implemented by an organization. Prevent this risk from becoming a reality by conducting the necessary planning before implementing your BPM suite. http://www.infotech.com/research/storyboard-plan-the-bpm-implementation
	Storyboard: Select a BPM Solution	Use this storyboard to guide your organization as you follow your procurement plan for evaluating and selecting a BPM solution. http://www.infotech.com/research/storyboard-select-a-bpm-solution
	Storyboard: Vendor Landscape Analyze BPM Requirements and Shortlist Vendors	Use the Vendor Landscape findings and project guidance in this phase to support your organization in developing requirements for your BPM solution evaluation and shortlisting vendors based on your expressed requirements. http://www.infotech.com/research/storyboard-vendor-landscape-analyze-bpm-requirements-and-shortlist-vendors
	Business Process Management Discussion Guide Template	Use this template to support your project team as you meet with the business and your IT staff to identify the requirements for your BPM suite. http://www.infotech.com/research/business-process-management-discussion-guide-template
	Business Process Management Procurement Project Charter Template	A project charter serves several important functions. It organizes the BPM selection and procurement project so that you can make efficient and effective resource allocation decisions. It also communicates important details about the project purpose, scope definition, and parameters. http://www.infotech.com/research/business-process-management-procurement-project-charter-template
	Business Process Management Request for Proposal Template	Request for Proposals provide organizations with the opportunity to give vendors a detailed account of the requirements and the expected capabilities of their desired suite. Create a defined procurement process by outlining the steps and guidelines for your selection. http://www.infotech.com/research/business-process-management-request-for-proposal-template
	Business Process Management Suite Evaluation and Scoring Tool	Use this tool to support your business in conducting an objective evaluation of the BPM vendors being considered for procurement. Consider each suite's functional capabilities, architecture, and costs while profiling and evaluating the suitability of each solution. http://www.infotech.com/research/business-process-management-suite-evaluation-and-scoring-tool

Type	Document	Description
	Business Process Management Test Plan Template	Ensure your designed processes are ready to be employed into the business environment by conducting a series of testing. Use this template to support process owners and developers in testing the viability of your automated processes. http://www.infotech.com/research/business-process-management-test-plan-template
	Business Process Management Use Case Fit Assessment Tool	Use this tool to identify the functional use cases that align with your business's future BPM suite. http://www.infotech.com/research/business-process-management-use-case-fit-assessment-tool
	Business Process Management Vendor Demo Script	Use this template to support your business's evaluation of vendors and their solutions. Provide vendors scenarios that prompt them to display not only their solution's capabilities, but also how the tool will support your organization's particular process automation needs. http://www.infotech.com/research/business-process-management-vendor-demo-script
	Business Process Management Vendor Shortlist Tool	Use this tool to develop your own custom shortlist. Utilize the tool's knock-out criteria and criteria weightings to identify vendors that align with your business's own solution requirements. http://www.infotech.com/research/business-process-management-vendor-shortlist-tool
	Business Process Management Work Breakdown Structure Template	Use this template to support the outline of the steps required to successfully implement a BPM suite into your IT landscape and business environment. http://www.infotech.com/research/business-process-management-work-breakdown-structure-template
Develop a Business Process Management Strategy		
	Move/Add/Change Request Form	Trying to manage unscheduled moves, adds, and changes (MACs) to desktop systems and user accounts can be one of IT's biggest headaches. Use a move/add/change request form to help you control the process, organize your IT resources, and increase end-user satisfaction. http://www.infotech.com/research/moveaddchange-request-form

Architecture: Data Architecture

Type	Document	Description
Blueprint: Create a Customized Big Data Architecture and Implementation Plan		
	Create a Customized Big Data Architecture and Implementation Plan	The business is demanding big data capabilities and has forced data architects who haven't planned for big data into a difficult situation. If data architects do not architect for big data, they could risk compromising the entire data environment. http://www.infotech.com/research/create-a-customized-big-data-architecture-and-implementation-plan
	Storyboard: Create a Customized Big Data Architecture and Implementation Plan	The business is demanding big data capabilities and has forced data architects who haven't planned for big data into a difficult situation. If data architects do not architect for big data, they could risk compromising the entire data environment. http://www.infotech.com/research/storyboard-create-a-customized-big-data-architecture-and-implementation-plan

Type	Document	Description
	Big Data Architecture Decision Making Tool	Use this tool in conjunction with the Create a Customized Big Data Architecture and Implementation Plan blueprint. This tool will assist you in determining key architectural principles and big data architectural decisions. http://www.infotech.com/research/big-data-architecture-decision-making-tool
	Big Data Architecture Initiative Definition Tool	Use this tool to map out the goals, objectives, benefits, payoffs, and costs of each initiative. http://www.infotech.com/research/big-data-architecture-initiative-definition-tool
	Big Data Architecture Initiative Planning Tool	This tool will help you plan and organize initiatives to achieve the target big data architecture. http://www.infotech.com/research/big-data-architecture-initiative-planning-tool
	Big Data Architecture Principles & Guidelines Template	This template provides an effective framework to identify and define big data architecture principles and guidelines. http://www.infotech.com/research/big-data-architecture-principles-guidelines-template
Blueprint: Develop an Enterprise Data Architecture Aligned with the Business Strategy		
	Develop an Enterprise Data Architecture Aligned with the Business Strategy	Define a data architecture that is consistent with organizational goals and align data investments with the business strategy to improve the organization's management and control of data assets. http://www.infotech.com/research/develop-an-enterprise-data-architecture-aligned-with-the-business-strategy
Blueprint: Data Architecture		
	Data Architecture	Establish the organization's approach to data and its perceived data maturity level. Identify the business process that will be used in the data audit. http://www.infotech.com/research/it-data-architecture
	Data Architecture Case Study of Olmsted Medical Center	Olmsted Medical Center provides healthcare to communities in southern Minnesota via a centralized hospital and 13 clinical locations. Olmsted has recently implemented an Electronic Health Record, and wants to combine clinical and ambulatory data to give a single view of patient information. http://www.infotech.com/research/data-architecture-case-study-of-olmsted-medical-center
	Data Architecture Case Study of a Large Hospital	A large hospital with a rich and time-honored history was well-known for its innovation and academic research activities. IT needed to ensure that its data architecture could support both the hospital's day-to-day patient care and ongoing research mandates. The hospital recruited Info-Tech to guide them through a one-week data architecture workshop. http://www.infotech.com/research/data-architecture-case-study-of-a-large-hospital

Collaboration & Productivity Applications Research

Collaboration & Productivity Apps: Email & Messaging

Type	Document	Description
Blueprint: Make the Decision to Upgrade to MS Exchange 2010		
	Make the Decision to Upgrade to MS Exchange 2010	Understand the new features in Exchange 2010 and how these may improve operational efficiency and lower operational costs. http://www.infotech.com/research/it-make-the-decision-to-upgrade-to-ms-exchange-2010
	Storyboard: Make the Decision to Upgrade to MS Exchange 2010	With the November 2009 release of Exchange 2010, Microsoft has brought major changes to its cornerstone unified communications product. Use this research to determine if you should upgrade to Exchange 2010 and if you should use an on-demand, on-premise or hosted deployment method. http://www.infotech.com/research/storyboard-make-the-decision-to-upgrade-to-ms-exchange-2010
	Exchange 2010 Total Cost of Ownership Calculator	Microsoft's Exchange Server holds the largest worldwide market share of any enterprise messaging solution. As IT leaders position an Exchange 2010 upgrade on the roadmap, this TCO calculator will be a key component in building a business case for the upgrade. More importantly, it clearly illustrates the cost differences between moving to an on-demand solution compared to implementing on-premise. http://www.infotech.com/research/exchange-2010-total-cost-of-ownership-calculator
Blueprint: Move Email to the Cloud		
	Move Email to the Cloud	The future of email is in the cloud. IT leaders must have a position on cloud email and make the appropriate preparations. It is the most cost-effective email option for most enterprises. http://www.infotech.com/research/decide-if-i-should-upgrade-my-e-mail-platform
	Storyboard: Move Email to the Cloud	The future of email is in the cloud. IT leaders must have a position on cloud email and make the appropriate preparations. It is the most cost-effective email options for most enterprises. http://www.infotech.com/research/it-storyboard-move-email-to-the-cloud
	Email TCO Comparison Calculator	When looking at a potential email upgrade there are several deployment options to consider - each with their own costs and cost structures. Use this tool to evaluate and compare TCO for the options that are of interest to you. http://www.infotech.com/research/it-email-tco-comparison-calculator
	Video: Move Email to the Cloud	Prepare for cloud email. It's inevitable. Almost 70% of Info-Tech clients will at least consider cloud email for their next implementation. http://www.infotech.com/research/video-move-email-to-the-cloud
Blueprint: Effectively Reduce Email Volume		
	Effectively Reduce Email Volume	Develop a strategy and roadmap to control the volume of email in your enterprise. http://www.infotech.com/research/effectively-reduce-email-volume
Blueprint: Reduce Email Volume		
	Reduce Email Volume	Treat email like a painkiller. It is incredibly valuable for some things but its abuse is deadly. Enterprises need to intervene and save their workers and bottom line. http://www.infotech.com/research/it-reduce-email-volume

Type	Document	Description
	Storyboard: Reduce Email Volume	Email can be an addictive and dangerous to enterprise culture and productivity. Take control of the problem by introducing social collaboration tools that will get used. http://www.infotech.com/research/it-storyboard-reduce-email-volume
	Case Study: Reducing Email	Email can be addictive, and dangerous to enterprise culture and productivity. However, it is a required tool that is the blood line of most enterprises. http://www.infotech.com/research/case-study-reducing-email
	Email Intervention Survey	Changes to how email fits into enterprise communication must be handled carefully. Test the user and IT-based changes in a short pilot, as described in slides 28 to 31 of the storyboard. http://www.infotech.com/research/it-email-intervention-survey
	Email Grief Survey	Email volume is often a problem for organizations. Use this survey to determine what the nature of the problem is and whether IT can provide a technical solution to reduce email overload. http://www.infotech.com/research/it-email-grief-survey
	Email Reduction	Email can be an addictive and dangerous to enterprise culture and productivity. Take control of the problem by introducing social collaboration tools that will get used. http://www.infotech.com/research/it-email-reduction
Blueprint: Switch Email Platforms		
	Switch Email Platforms	Many organizations are abandoning their original Novell GroupWise and Lotus Notes email platforms and are faced with email migration for the first time in their history. http://www.infotech.com/research/switch-e-mail-platforms
	Select an E-mail Archiving Solution with Confidence	The e-mail archiving market is a confusing mixture of storage vendors, compliance and e-discovery vendors, security vendors, and e-mail platform vendors. To complicate matters further, deployment options include on-premise, on-demand, and even traditional managed hosting. Organizations are struggling to reconcile requirements with vendor competencies, as well as choose the right deployment option. http://www.infotech.com/research/select-an-e-mail-archiving-solution-with-confidence
	Storyboard: Switch Email Platforms	Email is a mission-critical communications tool, but it can also be a platform for value-added integrations with other applications and communications platforms. Switching email platforms is a necessary change when requirements are no longer satisfied by the current system. However, it is also a risky change. http://www.infotech.com/research/it-storyboard-switch-e-mail-platforms
	Email Application Migration Decision Tree Source File	Use the source file of Info-Tech's Email Application Migration Decision Tree to revise the flowchart to tailor to your organization's needs for email migration considerations and decisions. http://www.infotech.com/research/it-e-mail-application-migration-decision-tree-source-file
	Email Application Migration Decision Tree	Use Info-Tech's Email Application Migration Decision Tree flowchart to work through email migration decisions and important considerations as part of the project plan. http://www.infotech.com/research/it-e-mail-application-migration-decision-tree

Type	Document	Description
	Email Migration System Integrator RFP Evaluation Tool	Today, the implementation practice for software systems, including email platforms, is relatively easy from the end-user perspective. However, for larger organizations, the migration and systems integration of these applications is not so easy. Info-Tech's Email Migration System Integrator RFP Evaluation Tool will help organizations evaluate system integrator RFP responses. http://www.infotech.com/research/it-e-mail-migration-system-integrator-rfp-evaluation-tool
	Email Migration System Integrator RFP Template	Today, the implementation practice for software systems, including email platforms, is relatively easy from the end-user perspective. However, for larger organizations, the migration and systems integration of these applications is not so easy. Info-Tech's Email Migration System Integrator RFP Template will help organizations solicit services from system integrators for email migration. http://www.infotech.com/research/it-e-mail-migration-system-integrator-rfp-template
	Switching Email Platform	Almost 50% of organizations have been using the same email platform for over six years. These legacy platforms are no longer satisfying business demands, expensive to support, and pose integration difficulties. Organizations must carefully plan email migrations and assess the impact on end users as well as other systems. http://www.infotech.com/research/it-switching-e-mail-platforms

Collaboration & Productivity Apps: Worker Collaboration

Type	Document	Description
Blueprint: Implement a Collaboration Platform		
	Implement a Collaboration Platform	Collaboration platforms, like Microsoft SharePoint, can require as much IT resources to implement and operate as applications like e-mail, but collaboration implementation projects are often understaffed. http://www.infotech.com/research/implement-a-new-collaboration-platform
	Storyboard: Implement a Collaboration Platform	Successfully implementing a collaboration platform is essential for realizing business value. The implementation should be split into two distinct phases: initial platform deployment and ongoing solution design. http://www.infotech.com/research/it-storyboard-implement-a-collaboration-platform
	Collaboration Implementation Budgeting Tool	Many organizations fail to adequately budget for their collaboration implementations, leading to cost and time overruns. This tool will help you budget for initial platform deployment and ongoing collaboration solution design. http://www.infotech.com/research/it-collaboration-implementation-budgeting-tool
	Collaboration Platform Deployment Checklist	Initial collaboration platform deployment consists of a number of discrete steps, from creating the front-end, support model, and back-end to designing and executing pilot projects. This tool will help serve as the basis for platform deployment project management. http://www.infotech.com/research/it-collaboration-platform-deployment-checklist

Type	Document	Description
	Collaboration Platform Annual Audit Template	Info-Tech's Annual Audit Template will help you conduct an annual assessment of the existing collaboration environment. It will consider a variety of different factors to construct a strategy for the ongoing operation of the collaboration system. http://www.infotech.com/research/it-collaboration-platform-annual-audit-template
	Successfully Implement a Collaboration Platform	Successfully implementing a collaboration platform is essential for realizing business value. The implementation should be split into two distinct phases: initial platform deployment and ongoing solution design. IT managers are familiar with the former, but must also be actively involved in the latter to ensure the long-term success of the collaboration environment. http://www.infotech.com/research/successfully-implement-a-collaboration-platform
Blueprint: Optimize an Enterprise Collaboration Strategy		
	Optimize an Enterprise Collaboration Strategy	Allowing employees and teams to make decisions and gather resources with collaboration is an absolute requirement for knowledge-intensive companies. Organizations must enable knowledge-based workflows with the right collaboration strategy for maximum team productivity. http://www.infotech.com/research/optimize-an-enterprise-collaboration-strategy
	Storyboard: Optimize an Enterprise Collaboration Strategy	Allowing employees and teams to make decisions and gather resources with collaboration is an absolute requirement for knowledge-intensive companies. Organizations must enable knowledge-based workflows with the right collaboration strategy for maximum team productivity. http://www.infotech.com/research/storyboard-optimize-an-enterprise-collaboration-strategy
	Collaboration Readiness Assessment	Collaboration tools are invaluable for enhancing knowledge sharing, innovation and employee-to-employee communication, but some organizations are better positioned to immediately take advantage of these tools than others. Use this assessment to gauge your organization's readiness to adopt collaboration tools. http://www.infotech.com/research/collaboration-readiness-assessment
	Collaboration Solution Designer	The Collaboration Solution Designer assesses the needs and collaboration patterns of each workgroup in your organization and aggregates the results to provide an enterprise wide recommendation of the collaboration tools your organization could benefit from. http://www.infotech.com/research/collaboration-solution-designer
	Collaboration Implementation Budget	Many organizations fail to adequately budget for their collaboration implementations, leading to cost and time overruns. This tool will help you budget for initial platform deployment and ongoing collaboration solution design. http://www.infotech.com/research/collaboration-implementation-budget
	Collaboration Business Plan Template	Documenting social collaboration and E2E interaction strategy into a business plan is a crucial step in planning a social tool implementation. This template builds on the results from the Social Collaboration Maturity and Readiness Assessment tool to help construct a living social collaboration business plan for the enterprise. http://www.infotech.com/research/it-social-collaboration-business-plan-template

Type	Document	Description
▶	Building an Enterprise Collaboration Strategy	Social tools are now being offered by a number of collaboration vendors. Many organizations are unsure of how to integrate social tools with existing team workflows. Managers must embrace, rather than hinder, integration of social collaboration tools. This video will elaborate on how to use social tools for employee-to-employee collaboration. http://www.infotech.com/research/it-building-an-enterprise-social-collaboration-strategy
	Collaboration Implementation Budgeting Tool	Many organizations fail to adequately budget for their collaboration implementations, leading to cost and time overruns. This tool will help you budget for initial platform deployment and ongoing collaboration solution design. http://www.infotech.com/research/it-collaboration-implementation-budgeting-tool
Vendor Landscape: Collaboration Platforms		
	Vendor Landscape: Collaboration Platforms	Effective employee-to-employee collaboration is critical for knowledge-intensive organizations. Social tools, mobile access, and social workflow management now dominate the collaboration market and are almost commodity. Integration with other systems should be a major evaluation criterion over the next two years! http://www.infotech.com/research/vendor-landscape-collaboration-platforms--2
	Vendor Landscape Storyboard: Collaboration Platforms	Effective employee-to-employee collaboration is critical for knowledge-intensive organizations. Social tools, mobile access, and the rise of social workflow management are rapidly disrupting the collaboration market. Pick a vendor that best aligns with the needs of your teams! http://www.infotech.com/research/vendor-landscape-storyboard-collaboration-platforms
	Collaboration Platforms Vendor Shortlist Tool	Effective employee-to-employee collaboration is critical for knowledge-intensive organizations. Social tools, mobile access, and social workflow management now dominate the collaboration market and are almost commodity. http://www.infotech.com/research/collaboration-platforms-vendor-shortlist-tool
	Collaboration Platform RFP Scoring Tool	After responses to an RFP have been received, enterprises considering collaboration platforms need a way to compare potential solutions. Use this RFP scoring tool to record and evaluate features across vendors. http://www.infotech.com/research/collaboration-rfp-scoring-tool
	Collaboration Platform RFP Template	Use this template to help create a Request for Proposal (RFP) that lists a collaboration platform's features according to enterprise requirements. http://www.infotech.com/research/collaboration-solution-rfp-template
▶	Evaluate Web Conferencing Vendors	Witness the power of this fully armed and operational collaboration system, and ensure you make the best Web conferencing decisions for the enterprise. http://www.infotech.com/research/it-evaluate-web-conferencing-vendors
Vendor Landscape: Cloud File Sharing		
	Vendor Landscape: Cloud File Sharing	File collaboration is evolving. When traditional enterprise content management solutions fail you, consider cloud file sharing as an alternative. http://www.infotech.com/research/it-vendor-landscape-cloud-file-sharing

Type	Document	Description
	Cloud File Sharing Vendor Shortlist Tool	Info-Tech conducted its own market evaluation of eight leading cloud file sharing (CFS) vendors. This tool allows enterprises to profile their CFS requirements and generate a shortlist of vendors. http://www.infotech.com/research/it-cloud-file-sharing-vendor-shortlist-tool
	Cloud File Sharing Vendor Shortlist & Detailed Feature Analysis Tool	Info-Tech conducted its own market evaluation of leading cloud file sharing (CFS) vendors. This tool allows enterprises to profile their CFS requirements and generate a shortlist of vendors. http://www.infotech.com/research/cloud-file-sharing-vendor-shortlist-detailed-feature-analysis-tool
	Cloud File Sharing RFP Template	Organizations embarking on the selection process for a cloud file sharing solution may elect to issue a Request for Proposal (RFP) after determining their final selection criteria. http://www.infotech.com/research/cloud-file-sharing-rfp-template
	Cloud File Sharing Vendor Demo Script	This template is designed to provide cloud file sharing vendors with a consistent set of instructions, ensuring an objective comparison of product features - all while evaluating ease-of-use, ease of set-up, and configuration. http://www.infotech.com/research/cloud-file-sharing-vendor-demo-script
	Enterprise Wiki Appropriateness Assessment	A business-oriented wiki can be a powerful collaboration and content solution for the enterprise. Use this tool to find out if your organization can benefit from an enterprise wiki and to determine the most suitable usage areas for your situation. http://www.infotech.com/research/enterprise-wiki-appropriateness-assessment
	Small Enterprise Teamware Appropriateness Assessment	Teamware promises particular benefit to small enterprises due to the low cost and increasing use of an on-demand delivery model. Use this tool to determine if teamware is appropriate for your organization. http://www.infotech.com/research/small-enterprise-teamware-appropriateness-assessment
	Salesforce.com: Not Your Father's CRM Anymore	At Dreamforce 2011, Salesforce.com unveiled more capabilities in the areas of enterprise collaboration and platform as a service (PaaS). The company is making it clear that it wants to be thought of as a cloud-based strategic partner in the enterprise, not just a CRM vendor. http://www.infotech.com/research/it-salesforcecom-not-your-fathers-crm-anymore
Additional Resources		
	Collaboration Readiness Assessment Tool	Social tools are invaluable for enhancing employee-to-employee collaboration, but some organizations are better positioned to immediately take advantage of social tools than others. Use this tool to determine where your organization rates. http://www.infotech.com/research/it-social-collaboration-maturity-and-readiness-assessment
	File Sharing: Risk or Remedy?	Due to the failure of traditional tools to meet their needs, many end users are pursuing ad-hoc adoption of file sharing services like Dropbox and Box. IT needs to approach these tools with an open mind; they can be cost-effective options to close legitimate gaps in their collaboration infrastructure. http://www.infotech.com/research/it-file-sharing-risk-or-remedy

Type	Document	Description
	What Does an iPod Have in Common with a Contact Center?	Improving agent-facing software usability is a key factor in the contact center productivity picture and provides significant financial payback. Take a lesson from the usability engineering process Apple uses to develop its products, including the phenomenally successful iPod. One financial institution did and found it significantly reduced call handle time and agent stress. http://www.infotech.com/research/what-does-an-ipod-have-in-common-with-a-contact-center

Collaboration & Productivity Apps: Worker Content Creation

Type	Document	Description
Blueprint: Build a Content Creation Ecosystem		
	Build a Content Creation Ecosystem	Organizations spend an incredible amount of time and money licensing and implementing Microsoft Office. By creating an ecosystem of different products distributed by individual employee needs, organizations can save money on licensing costs and give employees only the functionality they need. http://www.infotech.com/research/it-build-a-content-creation-ecosystem
	Storyboard: Build a Content Creation Ecosystem	Organizations spend an incredible amount of time and money licensing and implementing Microsoft Office. By creating an ecosystem of different products distributed by individual employee needs, organizations can save money on licensing costs and give employees only the functionality they need. http://www.infotech.com/research/it-storyboard-build-a-content-creation-ecosystem
	Office Suite Test Document Scorecard	Use this scorecard in tandem with the Office Suite test documents and decision tool to score the compatibility of your chosen alternative suite with Microsoft Office. http://www.infotech.com/research/it-office-suite-test-document-scorecard
	Microsoft Office Cost Calculator and Decision Tool	Use the Microsoft Office Cost Calculator and Decision Tool to discover your organization's reliance on Microsoft Office and to provide a cost breakdown of moving different numbers of users to an alternate suite. http://www.infotech.com/research/it-microsoft-office-cost-calculator-and-decision-tool
	Content Creation and Sharing Profile Project Template	Use the Content Creation and Sharing Profile Project Template as a project outline and charter to assist in the gathering of concerns and issues from each department to appropriately support content creation. http://www.infotech.com/research/it-content-creation-and-sharing-profile-project-template
	General Questions to Ask When Evaluating Productivity Suites	These questions are based on the choice between Office as the incumbent and an alternative solution. The questions are framed as the choice between the feature set that can be achieved through upgrade, which would be the least painful path, and completely replacing Office. http://www.infotech.com/research/it-general-questions-to-ask-when-evaluating-productivity-suites
	Office Suite PowerPoint Test Document	The Office Suite PowerPoint Test Document is for use in testing the compatibility of PowerPoint presentations with alternative office suites. It includes many elements that a business might need for internal and external facing presentations. http://www.infotech.com/research/it-office-suite-powerpoint-test-document

Type	Document	Description
	Office Suite Word Test Document	The Office Suite Word Test Document is for use in testing the compatibility of Word documents with alternative office suites. http://www.infotech.com/research/it-office-suite-word-test-document
Blueprint: Build a Strategy for Document Security and Electronic Approval		
	Build a Strategy for Document Security and Electronic Approval	Document security technologies reduce information leakage and mitigate security risks. Electronic approvals shorten cycle times and prepare the organization for touch devices and digital ink. http://www.infotech.com/research/it-build-a-strategy-for-document-security-and-electronic-approval
	Build a Strategy for Document Security and Electronic Approval Storyboard	Document security technologies reduce information leakage and mitigate security risks. Electronic approvals shorten cycle times and prepare the organization for touch devices and digital ink. http://www.infotech.com/research/storyboard-build-a-strategy-for-document-security-and-electronic-approval
	Document Security Needs Assessment Tool	Use this tool to evaluate your current needs with respect to document security and electronic approvals. http://www.infotech.com/research/it-document-security-needs-assessment-tool
	Document Security Policy Template	Create a document security policy to specify guidelines for encryption, protection, redaction, and metadata cleansing. http://www.infotech.com/research/it-document-security-policy-template
Blueprint: Catch the Microsoft Office 2013 Productivity Wave		
	Catch the Microsoft Office 2013 Productivity Wave	The Microsoft 2013 update won't be introducing anything drastically new in terms of functionality, but it is bringing parity between the on-premise and cloud-based offerings. The cloud version, Office 365, should be strongly considered by any organization thinking of upgrading as it will likely be key to Microsoft's upgrade strategy going forward. http://www.infotech.com/research/it-catch-the-microsoft-office-2013-productivity-wave
	Storyboard: Catch the Microsoft Office 2013 Productivity Wave	This set will help organizations struggling to decide between the different Microsoft Office packages, assess pricing, understand the new features, and prepare for any challenges they might face in the upgrade process. http://www.infotech.com/research/it-storyboard-catch-the-microsoft-office-2013-productivity-wave
	Three-Year TCO Comparison for On-Premise and Cloud Office Licensing	The Three-Year TCO Comparison for On-Premise and Cloud Office Licensing provides cost guidance between Microsoft Office 2013 on-premise and Office 365. http://www.infotech.com/research/three-year-tco-comparison-for-on-premise-and-cloud-office-licensing
	Productivity Requirements to Office 2013 Features Tool	Productivity Requirements to Office 2013 Features Tool provides the potential cost savings of upgrading by assessing an organization's requirements and priorities. http://www.infotech.com/research/it-productivity-requirements-to-office-2013-features-tool
	Video: Catch the MS Office 2013 Productivity Wave	This set will help organizations struggling to decide between the different Microsoft Office packages, assess pricing, understand the new features, and prepare for any challenges they might face in the upgrade process. http://www.infotech.com/research/it-video-catch-the-ms-office-2013-productivity-wave

Blueprint: Create a Strategy and Roadmap for Office 365		
	Create a Strategy and Roadmap for Office 365	Microsoft wants IT leaders to move Office to the cloud; those same leaders want to stay on-premise. This tension will frustrate IT planning for the next five years. http://www.infotech.com/research/create-a-strategy-and-roadmap-for-office-365
	Storyboard: Create a Strategy and Roadmap for Office 365	Office 365 is Microsoft's critical product â€“ they have a strategy for selling it to C-suite; you need a strategy to ensure that Office 365 adoption is appropriate and can be implemented on your schedule â€“ not Microsoft's schedule. http://www.infotech.com/research/storyboard-create-a-strategy-and-roadmap-for-office-365
	Office 365 Value and Strategy Tool	Start by defining how content is created and used in the organization. Balance the desire to move to Office 365 with the cost of licencing and the different skill set require for Office 365 success versus the on-premise applications. http://www.infotech.com/research/office-365-value-and-strategy-tool
Blueprint: Squeeze More Business Value from Existing Applications		
	Make the Decision to Upgrade to Microsoft Office 2010	This solution set will allow organizations to determine the most appropriate course of action for upgrading their office productivity suite. http://www.infotech.com/research/make-the-decision-to-upgrade-to-microsoft-office-2010
Additional Resources		
	Cost Cutting Podcast: Trim Microsoft Licensing Costs	Microsoft licensing is a significant cost driver for most IT organizations. Finally, there's a rational approach that can be used to determine whether the organization is overspending in this area. This podcast will provide guidance for optimizing both the short-term and long-term Microsoft licensing approach. http://www.infotech.com/research/webcast-cutting-microsoft-licensing-costs
	Workarounds to Ease Excel Compatibility Headaches	Compatibility issues with older versions of Office may have serious repercussions on the integrity of Excel spreadsheets that are shared between Office 2007 and previous versions. Where there is no choice but to work across multiple releases of Excel, standards must be established to secure the integrity of Excel spreadsheet data. http://www.infotech.com/research/workarounds-to-ease-excel-compatibility-headaches

Collaboration & Productivity Applications: Collaboration & Teamware

Type	Document	Description
	What do we need to know to move to SharePoint 2013?	SharePoint 2013 (or SharePoint 15 depending on your viewpoint) is in beta and as of this writing, no official release date has been announced. However, it has been suggested that general availability is currently slated for "early 2013." http://www.infotech.com/research/it-what-do-we-need-to-know-to-move-to-sharepoint-2013

Collaboration & Productivity Applications: Social Networking/Computing

Type	Document	Description
	Social Networking and Recruiting: Reap the Benefits; Reduce the Risks	The influence of online social networking is presently pervading businesses in North America. While these powerful networking tools have many benefits to offer, ensure their authorized use is contained within the bounds of an employee's official role and corporate capacity. http://www.infotech.com/research/social-networking-and-recruiting-reap-the-benefits-reduce-the-risks

Customer Engagement & Commerce Research

Customer Engagement & Commerce: Customer Engagement Optimization

Type	Document	Description
Blueprint: Build IT Capabilities to Enable Digital Marketing Success		
	Build IT Capabilities to Enable Digital Marketing Success	Investment in digital marketing technology has exploded as consumers flock to digital channels like email, social networking, video, photo, and mobile apps. IT has less time than ever to become a strategic partner with product marketing groups as they migrate to digital channels. http://www.infotech.com/research/build-it-capabilities-to-enable-digital-marketing-success
	Storyboard: Build IT Capabilities to Enable Digital Marketing Success	This blueprint is designed to help IT and marketing achieve absolute consensus on the prioritization of digital channels and to create a roadmap for IT to build all capabilities needed to enable digital marketing success. http://www.infotech.com/research/storyboard-build-it-capabilities-to-enable-digital-marketing-success
	Digital Marketing Capability Builder Tool	This tool precisely determines and prioritizes the digital channels that your organization should and will pursue. It then identifies the IT capabilities that your organization needs to build to support these digital marketing channels. It identifies the best method for building these capabilities by building IT human capital, processes, and technology. http://www.infotech.com/research/digital-marketing-capability-builder-tool
	Digital Marketing Communication Deck	Use this communication deck to educate IT and Marketing stakeholders on the generic value of digital marketing channels. Get everyone on the same level and establish a shared vocabulary. http://www.infotech.com/research/digital-marketing-communication-deck
Blueprint: Develop an IT Strategy to Support Customer Service		
	Develop an IT Strategy to Support Customer Service	Take a business process management (BPM)-centric approach to model the desired future state of your customer service IT systems. Then develop an overall IT systems strategy by conducting a retrospective analysis on the current state of the business processes identified. http://www.infotech.com/research/develop-an-it-strategy-to-support-customer-service
	Storyboard: Develop an IT Strategy to Support Customer Service	With Customer Service being heavily IT dependent, there is opportunity for IT to collaborate with Customer Service to improve service quality and bring strategic value to the organization. http://www.infotech.com/research/storyboard-develop-an-it-strategy-to-support-customer-service

Type	Document	Description
	Project RACI Chart	The RACI chart assists you in organizing roles for carrying out project steps and ensuring that there are definite roles that different individuals in the organization must have. http://www.infotech.com/research/project-raci-chart
	Customer Service Business Process Shortlisting Tool	This tool serves to outline and prioritize your customer goals and link their relevance and value to your Customer Service processes. It provides a list of customer service processes up to Level 4 within the APQC framework which can be used to represent your task-oriented Level 5 process model. http://www.infotech.com/research/customer-service-business-process-shortlisting-tool
	Customer Service Systems Strategy Tool	This tool will help you holistically assess multiple aspects of Customer Service-related IT assets. The outputs of the tabs in the tool will either serve as input for sequential analysis or for direct decision-making regarding future state Customer Service IT systems. http://www.infotech.com/research/customer-service-systems-strategy-tool
	Customer Service Initiative Scoring and Roadmap	This tool serves to help project and management stakeholders visualize the implementation of Customer Service IT initiatives. It can also aid in the planning, prioritizing, and tracking of initiatives as needed. http://www.infotech.com/research/customer-service-initiative-scoring-and-roadmap
	Project Charter	This template is designed to help you build a project charter in a timely manner. http://www.infotech.com/research/project-charter

Enterprise Applications Research

Enterprise Applications: Content & Document Management

Type	Document	Description
Vendor Landscape: Process-Generated Content Management		
	Vendor Landscape Storyboard: Process-Generated Content Management	As the PGCM market evolves, capabilities that were once cutting edge become default and new functionality becomes differentiating. This vendor landscape will help you focus on the functionality you need to get the job done. http://www.infotech.com/research/vendor-landscape-storyboard-ecm-for-process-workers-
Additional Resources		
	WSS Appeal Drives Small Enterprise Adoption of SharePoint	Small enterprises approach SharePoint differently from larger organizations. Understand the adoption patterns and motivations of smaller companies to determine what SharePoint can mean for your enterprise. http://www.infotech.com/research/wss-appeal-drives-small-enterprise-adoption-of-sharepoint

Enterprise Applications: CRM, Sales, Marketing and Customer Support

Type	Document	Description
	Customer Relationship Management Suite Opportunity Assessment Tool for Large Enterprises	This tool will assist you in determining the value of a standalone Customer Relationship Management (CRM) Suite to your organization, as well as the best available point solutions for marketing, sales and customer service. http://www.infotech.com/research/it-customer-relationship-management-suite-opportunity-assessment-tool-for-large-enterprises
	Customer Relationship Management Suite Opportunity Assessment Tool for Small Enterprises	This tool will assist you in determining the value to your SMB of a standalone Customer Relationship Management (CRM) suite, as well as best-of-breed point solutions for sales, marketing, and customer service. http://www.infotech.com/research/it-customer-relationship-management-suite-opportunity-assessment-tool-for-small-enterprises
	CRM Suite Evaluation and Request for Proposal Scoring Tool for Large Enterprises	Once RFP responses have been received, organizations selecting a CRM Suite need a way to compare vendors across similar criteria. Use this RFP scoring tool to objectively evaluate vendor responses. http://www.infotech.com/research/it-crm-suite-evaluation-and-request-for-proposal-scoring-tool-for-large-enterprises
	CRM Suite Evaluation and Request for Proposal Scoring Tool for Small Enterprises	Once RFP responses have been received, organizations selecting a CRM suite need a way to compare vendors across similar criteria. Use this RFP scoring tool to objectively evaluate vendor responses. http://www.infotech.com/research/it-crm-suite-evaluation-and-request-for-proposal-scoring-tool-for-small-enterprises
	Customer Relationship Management Suite RFP Template for Large Enterprises	Use this customizable template to create a Request for Proposal (RFP) that includes the Customer Relationship Management (CRM) features that your organization requires. http://www.infotech.com/research/it-customer-relationship-management-suite-rfp-template-for-large-enterprises
	Customer Relationship Management Suite RFP Template for Small Enterprises	Use this customizable template to create a Request for Proposal (RFP) that includes the Customer Relationship Management (CRM) features that your organization requires. http://www.infotech.com/research/it-customer-relationship-management-suite-rfp-template-for-small-enterprises
	Customer Relationship Management Suite Vendor Demonstration Script	Use this demonstration script to provide vendors with a consistent set of instructions, ensuring an objective comparison of product features for a Customer Relationship Management (CRM) Suite. http://www.infotech.com/research/it-customer-relationship-management-suite-vendor-demonstration-script
	CRM Business Plan	This tool will help enterprises create a successful CRM business plan in an iterative manner, adding value on a project by project basis. http://www.infotech.com/research/it-crm-business-plan
	Enterprise Marketing Management Suites Vendor Demonstration Script	This template provides specific use cases and features that a vendor should demonstrate to ensure all requirements are met. Use this script during vendor demonstrations to direct the demonstration towards the features that are important to your organization. http://www.infotech.com/research/it-enterprise-marketing-management-suites-vendor-demonstration-script

Type	Document	Description
	Enterprise Marketing Management Suites RFP Template	Use this request for proposal (RFP) template to create a formal invitation for enterprise marketing management (EMM) suite vendors to submit a proposal meeting your requirements. http://www.infotech.com/research/it-enterprise-marketing-management-suites-rfp-template
	Lead Management Automation Vendor Demonstration Script	This template provides specific use cases and features that a vendor should demonstrate to ensure all requirements are met. Use this script during vendor demonstrations to direct the demonstration towards the features that are important to your organization. http://www.infotech.com/research/lead-management-automation-demonstration-script-template
	Lead Management Automation Suite RFP Template	Use this request for proposal (RFP) template to create a formal invitation for Lead Management Automation (LMA) suite vendors to submit a proposal meeting your LMA requirements. http://www.infotech.com/research/lead-management-automation-rfp-template
	Customer Service Knowledge Management Platform RFP Scoring Tool	After responses to an RFP have been received, enterprises considering Customer Service Knowledge Management (CSKM) platforms need a way to compare potential solutions. Use this RFP scoring tool to record and evaluate features across vendors. http://www.infotech.com/research/it-customer-service-knowledge-management-platform-rfp-scoring-tool
	Customer Service Knowledge Management Platform Opportunity Assessment Tool	This tool will assist you in determining the value to your organization of a standalone Customer Service Knowledge Management (CSKM) platform. http://www.infotech.com/research/it-customer-service-knowledge-management-platform-opportunity-assessment-tool
	Customer Service Knowledge Manager	To successfully implement a Customer Service Knowledge Management (CSKM) platform, ensure that you hire the right people with the right skills to serve as full-time Customer Service Knowledge Managers. http://www.infotech.com/research/it-customer-service-knowledge-manager
	Customer Service Knowledge Management Platform RFP Template	Use this template to create a Request for Proposal (RFP) that lists the Customer Service Knowledge Management (CSKM) features and selection criteria your organization is interested in. http://www.infotech.com/research/it-customer-service-knowledge-management-platform-rfp-template
	Customer Service Knowledge Management Platform Demo Script	This demonstration script template is designed to provide vendors with a consistent set of instructions ensuring an objective comparison of product features. Modify this script to fit individual needs and requirements. http://www.infotech.com/research/it-customer-service-knowledge-management-platform-demo-script
	Customer Service Maturity Assessment	Info-Tech's Customer Service Maturity Assessment provides managers with an objective assessment of the current state of their organization's customer service environment and offers recommendations for improvement. http://www.infotech.com/research/it-customer-service-maturity-assessment
	Customer Service Channel Readiness Assessment	Web-based and social-based customer service tools will not all deliver equal value to every enterprise. Info-Tech's Customer Service Channel Readiness Assessment will help assess the appropriateness of different social and web-based customer service tools. http://www.infotech.com/research/it-customer-service-channel-readiness-assessment

Type	Document	Description
▶	Customer Service Strategy: Serving the Social Customer	Organizations are exploiting social customer interaction channels for sales and marketing, but adoption of these channels for customer service is much slower. Proactively monitoring the social cloud for service opportunities gives organizations a new method for achieving their service goals. http://www.infotech.com/research/it-customer-service-strategy-serving-the-social-customer
Blueprint: Develop an IT Strategy to Support Sales		
	Develop an IT Strategy to Support Sales	New customer channels and technologies are putting pressure on sales organizations to adopt new capabilities that let their reps spend more time on closing deals, rather than prospecting and administrative tasks. http://www.infotech.com/research/develop-an-it-strategy-to-support-sales
	Sales Application Portfolio Matrix and Assessment	This tool will help you holistically assess multiple aspects of sales-related IT assets. The outputs of the tabs in the tool will either serve as input for sequential analysis or for direct decision making regarding the future-state sales application landscape. http://www.infotech.com/research/sales-application-portfolio-matrix-and-assessment
	Sales-IT Alignment Strategy Project Charter	This template is designed to help you expedite the development of a project charter designated for Sales-IT alignment. http://www.infotech.com/research/sales-it-alignment-strategy-project-charter
	Sales-IT Initiative Scoring, Prioritization, and Roadmap Tool	This tool serves to help project and management stakeholders visualize the implementation of Sales-IT initiatives. It can also help in development, planning, prioritizing, and tracking of initiatives as needed. http://www.infotech.com/research/sales-it-initiative-scoring-prioritization-and-roadmap-tool
	Sales-IT Solutions Requirements Documentation Template	This tool is designed to assist in the documentation, organization, and prioritization of requirements for Sales-IT alignment solutions. http://www.infotech.com/research/sales-it-solutions-requirements-documentation-template
Blueprint: Map Tools to Existing Collaboration Patterns		
	Vendor Landscape: Social Media Management Platforms	Selecting the right social media management vendor can be a daunting task, but there are plenty of powerful enterprise-ready solutions that can be used to enable your company's social media strategy. http://www.infotech.com/research/vendor-landscape-social-media-management-platforms
Vendor Landscape: Social Media Management Platforms		
	Vendor Landscape Storyboard: Social Media Management Platforms	Instrumenting a social media business strategy with technology, for all stakeholders, can be a challenging task in a software market that is still maturing and comprises scores of vendors. http://www.infotech.com/research/vendor-landscape-storyboard-social-media-management-platforms
	Social Media Management Platform Demonstration Script	Use this demonstration script to provide vendors with a consistent set of instructions, to ensure an objective comparison of product features. http://www.infotech.com/research/it-social-media-management-platform-demonstration-script

Type	Document	Description
	Social Media Management Platform RFP Scoring Tool	After receiving RFP responses, enterprises considering a Social Media Management Platform (SMMP) need a way to compare potential solutions. Use this RFP scoring tool to record and evaluate features across vendors. http://www.infotech.com/research/it-social-media-management-platform-rfp-scoring-tool
	Social Media Management Platform RFP Template	Use this template to help create a Request for Proposal (RFP) that lists features of a Social Media Management Platform (SMMP) according to your business requirements. http://www.infotech.com/research/it-social-media-management-platform-rfp-template
	Social Media Management Platform Vendor Shortlist and Detailed Feature Analysis Tool	Before selecting an SSMP vendor, generate a shortlist by using the Social Media Management Platform Vendor Shortlist and Detailed Feature Analysis Tool. http://www.infotech.com/research/social-media-management-platform-vendor-shortlist-and-detailed-feature-analysis-tool
Blueprint: Design a Field Service Automation Strategy		
	Design a Field Service Automation Strategy	Field service automation (FSA) software is a mature market. While FSA has been around for two decades, the market is changing due to mobile technologies that are altering core capabilities of field services personnel. http://www.infotech.com/research/it-design-a-field-service-automation-strategy
	Storyboard: Design a Field Service Automation Strategy	Field service software has been around for a long time, but mobile enhancements around wireless connectivity, offline capabilities and social collaboration, have changed the core capabilities of field services personnel and the field service automation market. http://www.infotech.com/research/it-storyboard-design-a-field-service-automation-strategy
	Field Service Automation RFP Scoring Tool	After responses to an RFP have been received, enterprises considering field service automation software need a way to compare potential solutions. Use this RFP scoring tool to record and evaluate features across vendors. http://www.infotech.com/research/it-field-service-automation-rfp-scoring-tool
	Field Service Automation Solution Demo Script	Use this demonstration script to provide vendors with a consistent set of instructions, ensuring an objective comparison of product features. http://www.infotech.com/research/field-service-automation-demo-script
Blueprint: Design a Service Strategy that Keeps Pace with Customers		
	Design a Service Strategy that Keeps Pace with Customers	Organizations are exploiting social customer interaction channels for sales and marketing, but adoption of these channels for customer service is much slower. Proactively monitoring the social cloud for service opportunities gives organizations a new method for achieving their service goals. http://www.infotech.com/research/it-design-a-service-strategy-that-keeps-pace-with-customers
	Storyboard: Design a Service Strategy that Keeps Pace with Customers	Organizations are exploiting social customer interaction channels for sales and marketing, but adoption of these channels for customer service is much slower. Proactively monitoring the social cloud for service opportunities gives organizations a new method for achieving their service goals. http://www.infotech.com/research/it-storyboard-design-a-service-strategy-that-keeps-pace-with-customers

Type	Document	Description
	CSM Platform Opportunity Assessment Tool	This tool will assist you in determining the value to your organization of a stand-alone Customer Service Management (CSM) platform. http://www.infotech.com/research/it-csm-platform-opportunity-assessment-tool
	Customer Service Maturity Assessment	Info-Tech's Customer Service Maturity Assessment provides managers with an objective assessment of the current state of their organization's customer service environment and offers recommendations for improvement. http://www.infotech.com/research/it-customer-service-maturity-assessment
	Customer Service Channel Readiness Assessment	Web-based and social-based customer service tools will not all deliver equal value to every enterprise. Info-Tech's Customer Service Channel Readiness Assessment will help assess the appropriateness of different social and web-based customer service tools. http://www.infotech.com/research/it-customer-service-channel-readiness-assessment
	Customer Service Strategy: Serving the Social Customer	Organizations are exploiting social customer interaction channels for sales and marketing, but adoption of these channels for customer service is much slower. Proactively monitoring the social cloud for service opportunities gives organizations a new method for achieving their service goals. http://www.infotech.com/research/it-customer-service-strategy-serving-the-social-customer
	Social Media Acceptable Use Policy	The risk of inappropriate information transfer between personal and business contacts within social media must be mitigated by implementing a policy. Tools to establish barriers between personal and private networks and tools to centrally manage accounts are only beginning to emerge. Start with the implementation of this paper policy. http://www.infotech.com/research/social-media-acceptable-use-policy
	Email Marketing Platform RFP Template	Use this request for proposal (RFP) template to create a formal invitation for email marketing platform vendors to submit a proposal meeting your email marketing requirements. http://www.infotech.com/research/it-e-mail-marketing-services-rfp-template
	Email Marketing Vendor Demonstration Script	This template is designed to provide email marketing vendors with a consistent set of instructions, ensuring an objective comparison of product features, all while evaluating ease of use, and ease of setup and configuration. http://www.infotech.com/research/e-mail-marketing-vendor-demonstration-script
	Social Analytics Specialist	The role of the Social Analytics Specialist is to assist with selecting, blueprinting, gathering requirements, designing, and rolling out social analytics solutions. http://www.infotech.com/research/it-social-analytics-specialist
	Social Analytics Business Plan	Social analytics is a cross-departmental initiative. Having a strong focus is crucial and a formal business plan is key to establishing that focus. This business plan will help you kick-start an analytics initiative, or build a CICOE. http://www.infotech.com/research/it-social-analytics-business-plan

Blueprint: Gain Real Insights with a Social Analytics Program		
	Gain Real Insights with a Social Analytics Program	Social analytics are indispensable for gaining real-time insights across marketing, sales and customer service. Use social analytics to tap into the "world's largest focus group" at significantly lower expense than traditional forms of market research. http://www.infotech.com/research/it-gain-real-insights-with-a-social-analytics-program
	Storyboard: Gain Real Insights with a Social Analytics Program	Social analytics are indispensable in gaining real-time insights across marketing, sales, and customer service. Use social analytics to tap into the "world's largest focus group" at significantly lower expense than traditional forms of marketing. http://www.infotech.com/research/it-storyboard-gain-real-insights-with-a-social-analytics-program
	Social Analytics Maturity Assessment	This tool provides IT managers with an objective assessment of the current state of their organization's social analytics environment and offers recommendations for those wishing to transition to the next stage. http://www.infotech.com/research/it-social-analytics-maturity-assessment
	Social Analytics Specialist	The role of the Social Analytics Specialist is to assist with selecting, blueprinting, gathering requirements, designing, and rolling out social analytics solutions. http://www.infotech.com/research/it-social-analytics-specialist
	Social Analytics Business Plan	Social analytics is a cross-departmental initiative. Having a strong focus is crucial and a formal business plan is key to establishing that focus. This business plan will help you kick-start an analytics initiative, or build a CICOE. http://www.infotech.com/research/it-social-analytics-business-plan
Blueprint: Implement a Social Media Program		
	Implement a Social Media Program	Most organizations understand the value of leveraging social media for customer interaction, but executing an effective strategy can be a daunting task. Successfully coordinate and align the social initiatives of different business process domains by including a steering committee, process workflows, and determining if a physical command center is appropriate. http://www.infotech.com/research/it-implement-a-social-media-program
	Storyboard: Implement a Social Media Program	This research allows organizations to successfully coordinate social initiatives through the implementation of a social media program that includes process workflows, a steering committee, and adoption of a Social Media Command Center (SMCC). http://www.infotech.com/research/it-storyboard-implement-a-social-media-program
	Social Media Maturity Assessment Tool	Use this tool to evaluate your position on the social media maturity model and receive feedback on how to optimize your strategy. http://www.infotech.com/research/it-social-media-maturity-assessment-tool
	Social Media Representative	Social Media Representatives use a variety of social channels to manage customer interactions. This individual will assist in strengthening the overall brand of the organization through the analysis of social interactions between customers and the organization. http://www.infotech.com/research/it-social-media-representative
	Social Media Manager	Use this complete job description to develop your own Social Media Manager job description for your organization. http://www.infotech.com/research/it-social-media-manager

	Social Media Steering Committee Charter Template	Establishing a Social Media Steering Committee is an important component of the implementation of a social media strategy. This charter outlines its purpose, agenda, membership, and mandate so that there is no ambiguity. http://www.infotech.com/research/it-social-media-steering-committee-charter-template
	Blogging and Microblogging Guidelines Template	The use of blogging and microblogging by subject matter experts (SMEs) and thought leaders within organizations is increasing. This template provides a starting point for creating an objective action charter for your thought leaders to follow while using blogging and microblogging services. http://www.infotech.com/research/it-blogging-and-microblogging-guidelines-template
	Social Media Acceptable Use Policy	The risk of inappropriate information transfer between personal and business contacts within social media must be mitigated by implementing a policy. Tools to establish barriers between personal and private networks and tools to centrally manage accounts are only beginning to emerge. Start with the implementation of this paper policy. http://www.infotech.com/research/social-media-acceptable-use-policy
Blueprint: Leverage Social Media for Enhanced Customer Interaction		
	Leverage Social Media for Enhanced Customer Interaction	The majority of B2B and B2C interactions are social at some point. Failure to craft a customer interaction strategy that embraces social channels puts companies at a significant competitive disadvantage. Enterprise social media strategy must comprise IT and all business stakeholders, including marketing, sales, service, PR and HR. http://www.infotech.com/research/leveraging-social-media-for-customer-interaction
	Storyboard: Leverage Social Media for Customer Interaction	The majority of B2B and B2C interactions are social at some point. Failure to craft a customer interaction strategy that embraces social channels puts companies at a significant competitive disadvantage. Enterprise social media strategy must comprise IT and all business stakeholders, including marketing, sales, service, PR and HR. http://www.infotech.com/research/storyboard-leverage-social-media-for-customer-interaction
	Social Media Opportunity Assessment Tool	The Social Media Opportunity Assessment Tool is designed to identify achievable goals in three social media target areas: sales, marketing, and customer service. http://www.infotech.com/research/social-media-opportunity-assessment-tool
	Social Media Steering Committee Charter Template	Establishing a Social Media Steering Committee is an important component of the implementation of a social media strategy. This charter outlines its purpose, agenda, membership, and mandate so that there is no ambiguity. http://www.infotech.com/research/it-social-media-steering-committee-charter-template
	Social Media Business Plan Template	Documenting your customer interaction management strategy and achievable social media opportunities into a business plan is a crucial step in planning a social media implementation. This template builds on the results from the social media opportunity assessment tool to help you build a living social media business plan for the enterprise. http://www.infotech.com/research/social-media-business-plan-template

	Social Media Acceptable Use Policy	The risk of inappropriate information transfer between personal and business contacts within social media must be mitigated by implementing a policy. Tools to establish barriers between personal and private networks and tools to centrally manage accounts are only beginning to emerge. Start with the implementation of this paper policy. http://www.infotech.com/research/social-media-acceptable-use-policy
	Leverage Social Media for Customer Interaction	This video will help you cut through the hype and gain a better understanding of what social media is and how it can help your organization. Consumers are adopting social media at a breakneck pace, and organizations need to keep up to remain relevant. Social media is not without risks, but it can be a formidable tool for interacting with customers, especially when it is linked to the organization's existing CRM solutions. http://www.infotech.com/research/leverage-social-media-for-customer-interaction
Blueprint: Select and Implement a Marketing Management Suite		
	Select and Implement a Marketing Management Suite	This blueprint will provide an end-to-end roadmap to your clients for determining their requirements for a MMS, mapping MMS functionality to marketing-related workflows, picking a vendor, and implementing the chosen solution. http://www.infotech.com/research/select-and-implement-a-marketing-management-suite
Blueprint: Social Media		
	Social Media	The Social Media workshop provides clear, measurable improvements to your social media strategy. http://www.infotech.com/research/social-media
Design a Customer Service Knowledge Management Strategy		
	Design a Customer Service Knowledge Management Strategy	Complex product portfolios and high volume customer service inquiries cannot be serviced by simple FAQ lists and generic search engines. Dedicated customer service knowledgebase and specialized tools are required to deliver actual solutions to customers and service agents. http://www.infotech.com/research/it-design-a-customer-service-knowledge-management-strategy
	Storyboard: Design a Customer Service Knowledge Management Strategy	Evaluating and selecting the right Customer Service Knowledge Management (CSKM) platform can be a challenging task, but one that holds worthwhile results for organizations looking to beef up their customer service initiatives. http://www.infotech.com/research/it-storyboard-design-a-customer-service-knowledge-management-strategy
	Social CRM Project Charter	A social media project is a multi-departmental undertaking that must be managed well to be successful. Document the process in a formal project charter to keep everyone on the same page. http://www.infotech.com/research/social-crm-project-charter

Blueprint: Optimize Social Media Strategy by Service		
	Optimize Social Media Strategy by Service	Integrating the right social media services into your business is often a neglected component of building (or optimizing) a social media strategy. Jumping the gun on service selection could mean you are missing valuable opportunities to tap into conversations occurring about your brand. Put the right amount of strategic due diligence into service selection. http://www.infotech.com/research/optimize-social-media-strategy-by-service
	Storyboard: Optimize Social Media Strategy by Service	Integrating the right social media services into your business is often a neglected component of building (or optimizing) a social media strategy. Jumping the gun on service selection could mean you are missing valuable opportunities to tap into conversations occurring about your brand on other services. http://www.infotech.com/research/it-storyboard-optimize-social-media-strategy-by-service
	Social Media Service Selection Tool	The Social Media Service Selection Tool is designed to help organizations determine the most appropriate social media services for their business needs. http://www.infotech.com/research/it-social-media-service-selection-tool
	Social Media Services Audit Template	The Social Media Services Audit Template helps your organization assess the performance of each service against your organization's social media goals. http://www.infotech.com/research/it-social-media-services-audit-template
Blueprint: Select and Implement a CRM Platform		
	Select and Implement a CRM Platform	IT needs to conduct the “CRM orchestra” â€“ harmonize the needs of Marketing, Sales and Customer Service in order to select and implement a platform that hits it out of the park with the business. http://www.infotech.com/research/select-and-implement-a-crm-platform
	Storyboard: Select and Implement a CRM Platform	IT needs to conduct the “CRM Orchestra” - harmonize the needs of Marketing, Sales, and Customer Service in order to select and implement a platform that meets and exceeds all business requirements. http://www.infotech.com/research/storyboard-select-and-implement-a-crm-platform
	CRM Business Process Shortlisting Tool	This tool helps you outline and prioritize your CRM goals and link their relevance and value to APQC-based processes. http://www.infotech.com/research/crm-business-process-shortlisting-tool
	CRM Functionality Assessment	This tool asks a series of targeted questions that will help you determine what your CRM architecture model should look like across customization level, feature focus, and deployment model. http://www.infotech.com/research/crm-functionality-assessment
	CRM Suite Evaluation and Request for Proposal Scoring Tool for Large Enterprises	Once RFP responses have been received, organizations selecting a CRM Suite need a way to compare vendors across similar criteria. Use this RFP scoring tool to objectively evaluate vendor responses. http://www.infotech.com/research/it-crm-suite-evaluation-and-request-for-proposal-scoring-tool-for-large-enterprises
	CRM Selection and Implementation Project Workbook	This workbook contains a series of exercises for recording key decisions in executing a CRM selection and implementation project. http://www.infotech.com/research/crm-selection-and-implementation-project-workbook

	CRM Project Charter	This template will help build a living CRM project charter for the enterprise as well as document business justifications, resources, and timelines for CRM selection and justification. http://www.infotech.com/research/crm-project-charter
	CRM Steering Committee Charter	A CRM Steering Committee is an excellent tool for creating a harmonized CRM strategy between IT, Marketing, Sales, and Customer Service. This charter is an essential document for defining the scope and purpose of the committee. http://www.infotech.com/research/crm-steering-committee-charter
	Customer Relationship Management Suite RFP Template for Large Enterprises	Use this customizable template to create a Request for Proposal (RFP) that includes the Customer Relationship Management (CRM) features that your organization requires. http://www.infotech.com/research/it-customer-relationship-management-suite-rfp-template-for-large-enterprises
Blueprint: Support Enterprise Marketing with World-Class IT		
	Support Enterprise Marketing with World-Class IT	IT is failing to provide marketing with marketing automation (MA) technology, resulting in underperformance and strained resources. Your organization needs to implement MA technology to enable marketing success. This blueprint will examine your need for email marketing services, lead management automation (LMA), and enterprise marketing management (EMM) suites. http://www.infotech.com/research/it-build-an-it-strategy-to-support-marketing
	Storyboard: Support Enterprise Marketing with World-Class IT	IT is failing to provide Marketing with marketing automation (MA) technology, resulting in underperformance and strained resources. Implement MA technology to enable marketing success. This blueprint will examine your need for email marketing services, lead management automation (LMA), and enterprise marketing management (EMM) suites. http://www.infotech.com/research/storyboard-support-enterprise-marketing-with-world-class-it
	Marketing Automation Technology Selection Tool	This tool identifies the type of marketing automation technology (email, LMA, EMM) you need, and provides a scoring template for vendor proposals. The scoring template details requirements and allows for easy cost comparisons. http://www.infotech.com/research/marketing-automation-technology-selection-tool
	Email Marketing Requirements List	This document provides a detailed list of the basic requirements of an email marketing system. The requirements list is designed to assist in the requirements gathering process by identifying the requirements, requirement actors, and the business need the requirement addresses. http://www.infotech.com/research/email-marketing-requirements-list
	Lead Management Automation Requirements List	This document provides a detailed list of the basic requirements of a lead management automation suite. The requirements list is designed to assist in the requirements gathering process by identifying the requirements, requirement actors, and the business need the requirement addresses. http://www.infotech.com/research/lead-management-automation-requirements-list
	Enterprise Marketing Management Requirements List	This document provides a detailed list of the basic requirements of an enterprise marketing management suite. The requirements list is designed to assist in the requirements gathering process by identifying the requirements, requirement actors, and the business need the requirement addresses. http://www.infotech.com/research/enterprise-marketing-management-requirements-list

	Requirements Gathering Template	Documenting and storing all requirements in a single, centralized repository will help minimize confusion and complexity, especially for larger projects. http://www.infotech.com/research/requirements-gathering-template
	Policy Documentation Template	Policies should follow three simple rules. Use the Policy Documentation Template tab to brainstorm policies and determine if they pass the three-rule test. http://www.infotech.com/research/policy-documentation-template
	Enterprise Marketing Management Suites Vendor Demonstration Script	This template provides specific use cases and features that a vendor should demonstrate to ensure all requirements are met. Use this script during vendor demonstrations to direct the demonstration towards the features that are important to your organization. http://www.infotech.com/research/it-enterprise-marketing-management-suites-vendor-demonstration-script
	Enterprise Marketing Management Suites RFP Template	Use this request for proposal (RFP) template to create a formal invitation for enterprise marketing management (EMM) suite vendors to submit a proposal meeting your requirements. http://www.infotech.com/research/it-enterprise-marketing-management-suites-rfp-template
	Email Marketing Platform RFP Template	Use this request for proposal (RFP) template to create a formal invitation for email marketing platform vendors to submit a proposal meeting your email marketing requirements. http://www.infotech.com/research/it-e-mail-marketing-services-rfp-template
	Email Marketing Vendor Demonstration Script	This template is designed to provide email marketing vendors with a consistent set of instructions, ensuring an objective comparison of product features, all while evaluating ease of use, and ease of setup and configuration. http://www.infotech.com/research/e-mail-marketing-vendor-demonstration-script
	Lead Management Automation Vendor Demonstration Script	This template provides specific use cases and features that a vendor should demonstrate to ensure all requirements are met. Use this script during vendor demonstrations to direct the demonstration towards the features that are important to your organization. http://www.infotech.com/research/lead-management-automation-demonstration-script-template
	Lead Management Automation Suite RFP Template	Use this request for proposal (RFP) template to create a formal invitation for Lead Management Automation (LMA) suite vendors to submit a proposal meeting your LMA requirements. http://www.infotech.com/research/lead-management-automation-rfp-template
	Social Media Opportunity Assessment Tool	The Social Media Opportunity Assessment Tool is designed to identify achievable goals in three social media target areas: sales, marketing, and customer service. http://www.infotech.com/research/social-media-opportunity-assessment-tool
	Large Enterprise CRM Suite Vendor Shortlist Tool	This tool allows large enterprises to generate a customized shortlist of Customer Relationship Management (CRM) vendors based on required capabilities and future requirements for product features, architecture, and usability. http://www.infotech.com/research/it-crm-suite-vendor-shortlist-tool-for-large-enterprises

	Small Enterprise CRM Suite Vendor Shortlist Tool	This tool allows small enterprises to generate a customized shortlist of Customer Relationship Management (CRM) vendors based on required capabilities and future requirements. http://www.infotech.com/research/it-crm-suite-vendor-shortlist-tool-for-small-enterprises
	Customer Service Knowledge Management Platform Vendor Shortlist Tool	Use this tool to generate a customized shortlist of vendors based on the capabilities your organization requires in a Customer Service Knowledge Management (CSKM) platform. http://www.infotech.com/research/it-customer-service-knowledge-management-platform-vendor-shortlist-tool
	Customer Service Knowledge Management Platform RFP Scoring Tool	After responses to an RFP have been received, enterprises considering Customer Service Knowledge Management (CSKM) platforms need a way to compare potential solutions. Use this RFP scoring tool to record and evaluate features across vendors. http://www.infotech.com/research/it-customer-service-knowledge-management-platform-rfp-scoring-tool
	Customer Service Knowledge Management Platform Opportunity Assessment Tool	This tool will assist you in determining the value to your organization of a standalone Customer Service Knowledge Management (CSKM) platform. http://www.infotech.com/research/it-customer-service-knowledge-management-platform-opportunity-assessment-tool
	Customer Service Knowledge Manager	To successfully implement a Customer Service Knowledge Management (CSKM) platform, ensure that you hire the right people with the right skills to serve as full-time Customer Service Knowledge Managers. http://www.infotech.com/research/it-customer-service-knowledge-manager
	Customer Service Knowledge Management Platform RFP Template	Use this template to create a Request for Proposal (RFP) that lists the Customer Service Knowledge Management (CSKM) features and selection criteria your organization is interested in. http://www.infotech.com/research/it-customer-service-knowledge-management-platform-rfp-template
	Customer Service Knowledge Management Platform Demo Script	This demonstration script template is designed to provide vendors with a consistent set of instructions ensuring an objective comparison of product features. Modify this script to fit individual needs and requirements. http://www.infotech.com/research/it-customer-service-knowledge-management-platform-demo-script
	CSM Suite RFP Scoring Tool	Once RFP responses have been received, organizations selecting a CSM platform need a way to compare vendors across similar criteria. Use this RFP scoring tool to objectively evaluate vendor responses. http://www.infotech.com/research/it-csm-platform-rfp-scoring-tool
	CSM Suite RFP Template	Use this customizable template to create a Request for Proposal (RFP) that includes the CSM features that your organization requires. http://www.infotech.com/research/it-csm-platform-rfp-template
	Email Marketing Platform RFP Template	Use this request for proposal (RFP) template to create a formal invitation for email marketing platform vendors to submit a proposal meeting your email marketing requirements. http://www.infotech.com/research/it-e-mail-marketing-services-rfp-template
	Email Marketing Vendor Demonstration Script	This template is designed to provide email marketing vendors with a consistent set of instructions, ensuring an objective comparison of product features, all while evaluating ease of use, and ease of setup and configuration. http://www.infotech.com/research/e-mail-marketing-vendor-demonstration-script

	Field Service Automation RFP Scoring Tool	After responses to an RFP have been received, enterprises considering field service automation software need a way to compare potential solutions. Use this RFP scoring tool to record and evaluate features across vendors. http://www.infotech.com/research/it-field-service-automation-rfp-scoring-tool
	Field Service Automation Solution Demo Script	Use this demonstration script to provide vendors with a consistent set of instructions, ensuring an objective comparison of product features. http://www.infotech.com/research/field-service-automation-demo-script
	Lead Management Automation Vendor Demonstration Script	This template provides specific use cases and features that a vendor should demonstrate to ensure all requirements are met. Use this script during vendor demonstrations to direct the demonstration towards the features that are important to your organization. http://www.infotech.com/research/lead-management-automation-demonstration-script-template
	Lead Management Automation Suite RFP Template	Use this request for proposal (RFP) template to create a formal invitation for Lead Management Automation (LMA) suite vendors to submit a proposal meeting your LMA requirements. http://www.infotech.com/research/lead-management-automation-rfp-template
Vendor Landscape Plus: Social Media Management Platforms		
	Vendor Landscape Plus: Social Media Management Platforms	Instrumenting a social media business strategy with technology, for all stakeholders, can be a challenging task in a software market that is still maturing and comprises scores of vendors. http://www.infotech.com/research/vendor-landscape-plus-social-media-management-platforms
	Vendor Landscape Plus Storyboard: Social Media Management Platforms	Instrumenting a social media business strategy with technology, for all stakeholders, can be a challenging task in a software market that is still maturing and comprises scores of vendors. http://www.infotech.com/research/it-vendor-landscape-plus-storyboard-social-media-management-platforms
	Social Media Management Platform Vendor Shortlist Tool	Use this tool to generate a customized shortlist of vendors based on the capabilities that your organization requires in a Social Media Management Platform (SMMP). http://www.infotech.com/research/it-social-media-management-platform-vendor-shortlist-tool
	Social Media Management Platform RFP Scoring Tool	After receiving RFP responses, enterprises considering a Social Media Management Platform (SMMP) need a way to compare potential solutions. Use this RFP scoring tool to record and evaluate features across vendors. http://www.infotech.com/research/it-social-media-management-platform-rfp-scoring-tool
	Social Media Management Platform RFP Template	Use this template to help create a Request for Proposal (RFP) that lists features of a Social Media Management Platform (SMMP) according to your business requirements. http://www.infotech.com/research/it-social-media-management-platform-rfp-template
	Social Media Management Platform Demonstration Script	Use this demonstration script to provide vendors with a consistent set of instructions, to ensure an objective comparison of product features. http://www.infotech.com/research/it-social-media-management-platform-demonstration-script

Vendor Landscape: CRM Suites for Large Enterprises		
	Vendor Landscape: CRM Suites for Large Enterprises	Customer Relationship Management (CRM) suites are important for acquiring, retaining, and growing your customer base. Organizations must select a product that demonstrates a commitment to the rising social and mobile trends. http://www.infotech.com/research/it-vendor-landscape-crm-suites-for-large-enterprises
	Vendor Landscape Storyboard: CRM Suites for Large Enterprises	Customer Relationship Management (CRM) suites are important for acquiring, retaining, and growing your customer base. Your organization's use case may include advanced social capabilities, solid mobile support, or extensive collaboration features. Use Info-Tech's research to determine the most suitable vendor for your organization. http://www.infotech.com/research/it-vendor-landscape-storyboard-crm-suites-for-large-enterprises
	Large Enterprise CRM Suite Vendor Shortlist Tool	This tool allows large enterprises to generate a customized shortlist of Customer Relationship Management (CRM) vendors based on required capabilities and future requirements for product features, architecture, and usability. http://www.infotech.com/research/it-crm-suite-vendor-shortlist-tool-for-large-enterprises
Vendor Landscape: CRM Suites for Small Enterprises		
	Vendor Landscape: CRM Suites for Small Enterprises	Customer Relationship Management (CRM) suites are important for acquiring, retaining, and growing your customer base. http://www.infotech.com/research/it-vendor-landscape-crm-suites-for-small-enterprises
	Vendor Landscape Storyboard: CRM Suites for Small Enterprises	Info-Tech evaluated seven competitors in the small enterprise Customer Relationship Management (CRM) market. http://www.infotech.com/research/it-vendor-landscape-storyboard-crm-suites-for-small-enterprises
	Small Enterprise CRM Suite Vendor Shortlist Tool	This tool allows small enterprises to generate a customized shortlist of Customer Relationship Management (CRM) vendors based on required capabilities and future requirements. http://www.infotech.com/research/it-crm-suite-vendor-shortlist-tool-for-small-enterprises
Vendor Landscape: Customer Service Knowledge Management Suites		
	Vendor Landscape: Customer Service Knowledge Management Suites	Customer Service Knowledge Management (CSKM) solutions get the right information to the right person at the right time. Ensuring support of social and collaboration features is the key to implementation success. http://www.infotech.com/research/it-vendor-landscape-customer-service-knowledge-management-suites
	Vendor Landscape Storyboard: Customer Service Knowledge Management Suites	Info-Tech evaluated nine competitors in the Customer Service Knowledge Management market. http://www.infotech.com/research/it-vendor-landscape-storyboard-customer-service-knowledge-management-suites
	Customer Service Knowledge Management (CSKM) Vendor Shortlist Tool	This tool allows enterprises to generate a customized shortlist of Customer Service Knowledge Management (CSKM) vendors based on required capabilities and future requirements for product features, architecture, and usability. http://www.infotech.com/research/it-customer-service-knowledge-management-cskm-vendor-shortlist-tool

Vendor Landscape: Customer Service Management Suites		
	Vendor Landscape: Customer Service Management Suites	The complexity of product portfolios and customer service inquiries, as well as increasing social media, means that customer service can no longer be conducted with simple tools. Many organizations will benefit from the implementation of a standalone Customer Service Management (CSM) suite. http://www.infotech.com/research/it-vendor-landscape-customer-service-management-suites
	Vendor Landscape: Customer Service Management Suites Storyboard	Deciding which CSM suite to select is a difficult task. Use this research to expedite the selection process, and choose the best CSM platform for your organization's unique needs. http://www.infotech.com/research/it-vendor-landscape-customer-service-management-suites-storyboard
	Customer Service Management (CSM) Suites Vendor Shortlist Tool	This tool allows enterprises to generate a customized shortlist of Customer Service Management (CSM) vendors based on required capabilities and future requirements for criteria such as product features, architecture, and usability. http://www.infotech.com/research/it-customer-service-management-suites-csm-vendor-shortlist-tool
	CSM Suite RFP Scoring Tool	Once RFP responses have been received, organizations selecting a CSM platform need a way to compare vendors across similar criteria. Use this RFP scoring tool to objectively evaluate vendor responses. http://www.infotech.com/research/it-csm-platform-rfp-scoring-tool
	CSM Suite RFP Template	Use this customizable template to create a Request for Proposal (RFP) that includes the CSM features that your organization requires. http://www.infotech.com/research/it-csm-platform-rfp-template
Vendor Landscape: Email Marketing Solutions		
	Vendor Landscape: Email Marketing Solutions	Save time and money by using Info-Tech's Vendor Landscape to compare and contrast the major email marketing vendors, and then create a shortlist of the most appropriate vendors. http://www.infotech.com/research/it-vendor-landscape-email-marketing-solutions
	Vendor Landscape Storyboard: Email Marketing Solutions	Info-Tech evaluated eight competitors in the email marketing market. http://www.infotech.com/research/it-vendor-landscape-storyboard-email-marketing-solutions
	Email Marketing Solution Vendor Shortlist Tool	This tool allows large enterprises to generate a customized shortlist of email marketing vendors based on required capabilities and future requirements for product features, architecture, and usability. http://www.infotech.com/research/it-email-marketing-solution-vendor-shortlist-tool
Vendor Landscape: Field Service Automation		
	Vendor Landscape: Field Service Automation	Field Service Automation (FSA) suites are important for achieving effective scheduling and communication between technician, dispatcher, and the customer. http://www.infotech.com/research/it-vendor-landscape-field-service-automation
	Vendor Landscape Storyboard: Field Service Automation	Info-Tech evaluated 11 competitors in the Field Service Automation market. http://www.infotech.com/research/it-vendor-landscape-storyboard-field-service-automation

	Field Service Automation (FSA) Vendor Shortlist Tool	This tool allows enterprises to generate a customized shortlist of Field Service Automation (FSA) vendors based on required capabilities and future requirements for product features, architecture, and usability. http://www.infotech.com/research/it-field-service-automation-fsa-vendor-shortlist-tool
Vendor Landscape: Lead Management Automation		
	Vendor Landscape: Lead Management Automation	Save time and money by using Info-Tech's Vendor Landscape to compare and contrast the major LMA vendors and then create a shortlist of the most appropriate vendors. http://www.infotech.com/research/it-vendor-landscape-lead-management-automation
	Vendor Landscape Storyboard: Lead Management Automation	Info-Tech evaluated eight competitors in the Lead Management Automation (LMA) market. http://www.infotech.com/research/it-vendor-landscape-storyboard-lead-management-automation
	Lead Management Automation (LMA) Vendor Shortlist Tool	This tool allows large enterprises to generate a customized shortlist of Lead Management Automation (LMA) vendors based on required capabilities and future requirements for product features, architecture, and usability. http://www.infotech.com/research/it-lead-management-automation-lma-vendor-shortlist-tool
Vendor Landscape: Retail Point of Sale (POS) Solutions		
	Vendor Landscape: Retail Point of Sale (POS) Solutions	Point of sale (POS) solutions are a key component in the retail industry. While these systems have traditionally been used to serve customers, POS solutions have evolved to become an important store management tool. http://www.infotech.com/research/it-vendor-landscape-retail-point-of-sale-pos-solutions
	Vendor Landscape Storyboard: Retail Point of Sale (POS) Solutions	Info-Tech evaluated six competitors from the retail point of sale market. http://www.infotech.com/research/it-vendor-landscape-storyboard-retail-point-of-sale-pos-solutions
Additional Resources		
	Retail Banking CRM: Road to Differentiation & Higher Profits	Small (less than 100 branches) and mid-sized (101-500 branches) retail banks are facing a tough economic outlook and increased competition as Internet banking and call centers become part of the cost of doing business. Info-Tech recommends leveraging Customer Relationship Management (CRM) applications to convert these cost centers into revenue generators that tap the bank's most important asset, its clients. http://www.infotech.com/research/retail-banking-crm-road-to-differentiation-higher-profits
	Higher Education: Select CRM Based on Student Lifecycle	Institutions of higher education have unique needs for Customer Relationship Management (CRM) applications. Info-Tech Research Group recommends building a CRM strategy centered on the unique student lifecycle of the institution and then partner with vendors that specialize in CRM for higher education. http://www.infotech.com/research/higher-education-select-crm-based-on-student-lifecycle

Enterprise Applications: ERP Optimization

Type	Document	Description
Blueprint: Build an ERP Selection & Implementation Strategy		
	Build an ERP Selection & Implementation Strategy	Different enterprises need to put focus on different aspects of the Enterprise Resource Planning (ERP) selection process, depending on industry, business case, and the selected solution provider. http://www.infotech.com/research/it-build-an-erp-selection-strategy
	Storyboard: Build an ERP Selection & Implementation Strategy	IT leaders must prepare and build out an appropriate plan to survive to the end of an ERP selection and implementation project. To be successful, they must address five key challenges. http://www.infotech.com/research/it-storyboard-build-an-erp-selection-strategy
	ERP Project Planning & Tracking Tool	Enterprise Resource Planning (ERP) projects involve a variety of different steps. Info-this tool enables users to assign resources and track the completion status of a variety of different, mission critical tasks. http://www.infotech.com/research/it-erp-project-planning-tracking-tool
	ERP Site Expansion Checklist	Shifting from ERP implementation to ERP operation is a major challenge. This checklist provides guidance on the 14-step process to overcome these problems. http://www.infotech.com/research/it-erp-site-expansion-checklist
	ERP Runbook Template	Effectively operating an ERP system requires documentation of the supporting technical infrastructure. An ERP runbook must be created before the transition to operation. http://www.infotech.com/research/it-erp-runbook-template
	ERP Project Completion Checklist	Info-Tech's 21-step process for ERP selection and implementation projects helps IT leaders to prepare project plans, and get ready for future challenges. http://www.infotech.com/research/it-erp-project-completion-checklist
	ERP Business Case Template	Use the ERP Business Case Template and work with business units to develop an appropriate justification for ERP projects. http://www.infotech.com/research/erp-business-case-template-
	ERP Solution Specification Template	A solution specification is a crucial part of the Enterprise Resource Planning (ERP) evaluation and selection process. IT leaders and project managers should use this template after soliciting requirements and before creating an RFP and demo scripts. http://www.infotech.com/research/erp-solution-specification-template
	ERP Task Work Log for Subject Matter Experts	IT leaders soliciting functional requirements from Subject Matter Experts should use this Task Work Log to obtain and thoroughly document these needs. http://www.infotech.com/research/erp-task-work-log-for-subject-matter-experts
	ERP Requirements Template for Business Unit Managers	IT leaders soliciting functional requirements from business unit managers should use this template to thoroughly document these needs. http://www.infotech.com/research/erp-requirements-template-for-business-unit-managers
Blueprint: Determine if Cloud ERP Lies in the Future		
	Determine if Cloud ERP Lies in the Future	Cloud ERP is here to stay. Ultimately the decision is about risk, not cost, and the formula is right for start-ups, subsidiaries, and joint ventures. Include cloud options in ERP planning, but avoid white labeled options. http://www.infotech.com/research/it-determine-if-cloud-erp-lies-in-the-future

Type	Document	Description
	Storyboard: Determine if Cloud ERP Lies in the Future	Cloud ERP is here to stay. Ultimately the decision is about risk, not cost, and the formula is right for start-ups, subsidiaries, and joint ventures. Include cloud options in ERP planning, but avoid white labeled options. http://www.infotech.com/research/it-storyboard-determine-if-cloud-erp-lies-in-the-future
	Risk-Adjusted Cost-Benefit Analysis Tool for ERP Deployment Types	This workbook allows enterprises to fill in information regarding the costs, benefits, and risks of different types of ERP deployments. http://www.infotech.com/research/it-risk-adjusted-cost-benefit-analysis-tool-for-erp-deployment-types
	Cloud ERP Appropriateness Assessment Tool	This workbook allows IT leaders to answer a series of questions regarding their ERP requirements and readiness for various deployment options including on-premise, internal private cloud, hybrid cloud, hosted and SaaS. http://www.infotech.com/research/it-cloud-erp-appropriateness-assessment-tool
Blueprint: Develop an Appropriate ERP Operation Strategy		
	Develop an Appropriate ERP Operation Strategy	IT leaders and senior executives often have tremendous fear of Enterprise Resource Planning (ERP). There's a good reason; ERP is a complicated technology with many moving parts. http://www.infotech.com/research/develop-an-appropriate-erp-strategy
	Storyboard: Develop an Appropriate ERP Strategy	Enterprise Resource Planning (ERP) exists in every enterprise. It is often a low priority for IT managers until changes to the business make a very real, and very expensive, project. The real cost of a failed ERP initiative is IT careers. http://www.infotech.com/research/it-storyboard-develop-an-appropriate-erp-strategy
	ERP Annual Audit Template	The Info-Tech Enterprise Resource Planning (ERP) Annual Audit Template will help IT managers develop a strategy for the ongoing care, feeding, and replacement of the existing system. http://www.infotech.com/research/it-erp-annual-audit-template
	ERP Scripted Demo Template	The selection process for Enterprise Resource Planning (ERP) is an involved one. A crucial step in the process is the scripted demo. IT managers can use this editable template to create a scripted demo that is appropriate for their enterprise. http://www.infotech.com/research/erp-scripted-demo-template
	ERP Solution RFP Template	One of the most important steps in selecting an Enterprise Resource Planning (ERP) solution is the RFP. Use this editable template to craft an RFP that matches the needs of the enterprise. http://www.infotech.com/research/erp-solution-rfp-template
	Explore the Emerging World of SaaS ERP	SaaS ERP belongs on the shortlist for small enterprises and mid-sized divisions of larger enterprises. Make the business case on versatility, not on total cost. http://www.infotech.com/research/it-explore-the-emerging-world-of-saas-erp
Blueprint: Implement a Multi-site ERP		
	Implement a Multi-site ERP	Multi-site ERP is always a challenge. IT leaders must balance innovation within sites against a potential technical jumble of technologies, standards, and integrations. http://www.infotech.com/research/it-implement-a-multi-site-erp
	Storyboard: Implement a Multi-site ERP	Multi-site ERP is always a challenge. IT leaders must balance innovation within sites against a potential technical jumble of technologies, standards, and integrations. http://www.infotech.com/research/storyboard-implement-a-multi-site-erp-deployment

Type	Document	Description
	ERP Integration Steering Committee Charter	Understanding and defining the business case for extending the ERP system requires input from the business units and senior management. Build an Integration Steering Committee to get both of these groups involved throughout the ERP lifecycle. http://www.infotech.com/research/it-erp-integration-steering-committee-charter
	ERP Site Expansion Checklist	Shifting from ERP implementation to ERP operation is a major challenge. This checklist provides guidance on the 14-step process to overcome these problems. http://www.infotech.com/research/it-erp-site-expansion-checklist
Blueprint: Mobilize the Workforce by Mobilizing ERP		
	Mobilize the Workforce by Mobilizing ERP	ERP systems are implemented to improve efficiency in business processes, but organizations often do not realize the gains they hope for. Mobilizing your ERP system will increase the return of your ERP implementation. http://www.infotech.com/research/mobilize-the-workforce-by-mobilizing-erp
	Storyboard: Mobilize the Workforce by Mobilizing ERP	Mobile enterprise resource planning (ERP) is really about data: more of it, of better quality, and where you need it to be. http://www.infotech.com/research/storyboard-mobilize-the-workforce-by-mobilizing-erp
	Mobile ERP Opportunity Assessment Tool	This tool performs a three-stage gate analysis about your mobile ERP decision. After completing the tool, you will have a go or no go decision, a recommended path to pursue mobile ERP and a quantified business case for selling the concept of mobile ERP to senior management. http://www.infotech.com/research/mobile-erp-opportunity-assessment-tool
	Business Process-Based Documentation Template	The Process Based Documentation Template will allow you to build documentation that will help end users navigate the ERP system using the associated business process as a proxy for navigation. The template embraces three established best practice for building engaging end user documents. http://www.infotech.com/research/business-process-based-documentation-template
	Mobile ERP Use Case and Requirements Gathering Template	Inspired by Allistair Cockburn's book, Writing Effective Use Cases, this template will help build a use case and gather requirements for that specific use case when considering the development of a mobile ERP application. http://www.infotech.com/research/mobile-erp-use-case-and-requirements-gathering-template
Blueprint: Optimize Business Processes to Limit ERP Customization		
	Optimize Business Processes to Limit ERP Customization	This project blueprint will address common inefficiencies related to business processes that interact with your ERP system. The blueprint will help you both, prioritize what processes to focus on and how to fix those processes using simple, low cost solution involving configuring the ERP system. http://www.infotech.com/research/optimize-business-processes-to-limit-erp-customization
	Storyboard: Optimize Business Processes to Limit ERP Customization	This research will address common inefficiencies related to business processes that interact with your ERP system. The blueprint will help you both prioritize what processes to focus on and how to fix those processes using simple, low cost solutions involving configuring the ERP system. http://www.infotech.com/research/storyboard-optimize-business-processes-to-limit-erp-customization

Type	Document	Description
	ERP Optimization Program Manual	The ERP Optimization Program Manual will help maintain control over your ERP optimization process by providing one document to log all information relating to the ERP optimization process. http://www.infotech.com/research/erp-optimization-program-manual
	Business Process Assessment and Prioritization Tool	The Business Process Opportunity Assessment tool helps organizations understand key metrics relating to key business processes that interact with the ERP system. http://www.infotech.com/research/business-process-assessment-and-prioritization-tool
	Business Process-Based Documentation Template	The Process Based Documentation Template will allow you to build documentation that will help end users navigate the ERP system using the associated business process as a proxy for navigation. The template embraces three established best practice for building engaging end user documents. http://www.infotech.com/research/business-process-based-documentation-template
	Mid-Market ERP Vendor Shortlist Tool	Info-Tech conducted its own market evaluation of thirteen ERP solutions. Use this tool to narrow the vendors down to a shortlist of solutions that best satisfy the company's requirements. http://www.infotech.com/research/mid-market-erp-vendor-shortlist-tool
Vendor Landscape: Enterprise ERP		
	Vendor Landscape: Enterprise ERP	ERP systems designed to support large enterprises are by nature large complex application. Focus on the implementation and support costs to keep the project on budget. http://www.infotech.com/research/vendor-landscape-enterprise-erp
	Vendor Landscape Storyboard: Enterprise ERP	Info-Tech evaluated seven competitors in the Enterprise ERP market. http://www.infotech.com/research/vendor-landscape-storyboard-enterprise-erp
	Enterprise ERP Vendor Shortlist & Detailed Feature Analysis Tool	Before selecting an Enterprise ERP vendor, generate a shortlist by using the Enterprise ERP Vendor Shortlist & Detailed Feature Analysis Tool. http://www.infotech.com/research/enterprise-erp-vendor-shortlist-detailed-feature-analysis-tool
	ERP Vendor Demonstration Script	This demonstration script template is designed to provide vendors with a consistent set of instructions, ensuring an objective comparison of product features. http://www.infotech.com/research/erp-vendor-demonstration-script
	ERP Solution Specification Template	A solution specification is a crucial part of the Enterprise Resource Planning (ERP) evaluation and selection process. IT leaders and project managers should use this template after soliciting requirements and before creating an RFP and demo scripts. http://www.infotech.com/research/erp-solution-specification-template
Vendor Landscape: Higher Education ERP		
	Vendor Landscape: Higher Education ERP	This Enterprise Resource Planning (ERP) research outlines the vendor landscape for the higher education industry, discusses relative strengths and weakness of the ERP platforms, and provides advice for higher education institutions, enabling the selection an ERP solution that best aligns with their business plan. http://www.infotech.com/research/it-vendor-landscape-higher-education-erp

Type	Document	Description
	Vendor Landscape Storyboard: Higher Education ERP	Info-Tech evaluated six competitors in the education industry enterprise resource planning market, focusing on those vendors that have a strong market presence and/or reputational presence among small to mid-sized enterprises. http://www.infotech.com/research/vendor-landscape-storyboard-higher-education-erp
	Higher Education ERP Vendor Shortlist Tool	Info-Tech conducted its own market evaluation of six ERP solutions that specifically cater to the needs of higher education. Use this tool to narrow the vendors to a shortlist of solutions that best satisfy the institution's requirements. http://www.infotech.com/research/it-higher-education-erp-vendor-shortlist-tool
Vendor Landscape: Mid-Market ERP		
	Vendor Landscape: Mid-Market ERP	The ERP market is very fragmented with vendors differentiating themselves based on the verticals that they cover. http://www.infotech.com/research/it-vendor-landscape-mid-market-erp
	Vendor Landscape Storyboard: Mid-Market ERP	Info-Tech evaluated ten solutions in the Mid-Market ERP market. http://www.infotech.com/research/it-vendor-landscape-storyboard-mid-market-erp
	Mid-Market ERP Vendor Shortlist & Detailed Feature Analysis Tool	Before selecting a mid-market ERP vendor, generate a shortlist by using the Mid-Market ERP Vendor Shortlist & Detailed Feature Analysis Tool. http://www.infotech.com/research/mid-market-erp-vendor-shortlist-detailed-feature-analysis-tool
	ERP Vendor Demonstration Script	This demonstration script template is designed to provide vendors with a consistent set of instructions, ensuring an objective comparison of product features. http://www.infotech.com/research/erp-vendor-demonstration-script
	ERP Solution Specification Template	A solution specification is a crucial part of the Enterprise Resource Planning (ERP) evaluation and selection process. IT leaders and project managers should use this template after soliciting requirements and before creating an RFP and demo scripts. http://www.infotech.com/research/erp-solution-specification-template

Enterprise Applications: Human Resource Applications

Type	Document	Description
Blueprint: Drive a Robust Systems Strategy for HR to Achieve HR Objectives and Enable the Business		
	Drive a Robust Systems Strategy for HR to Achieve HR Objectives and Enable the Business	Evaluate your HR systems holistically to gain a strategic perspective and develop the appropriate functionality for your business needs. http://www.infotech.com/research/drive-a-robust-systems-strategy-for-hr-to-achieve-hr-objectives-and-enable-the-business
	Storyboard: Drive a Robust Systems Strategy for HR to Achieve HR Objectives and Enable the Business	Evaluate your HR systems holistically to gain a strategic perspective and develop the appropriate functionality for your business needs. http://www.infotech.com/research/storyboard-drive-a-robust-systems-strategy-for-hr-to-achieve-hr-objectives-and-enable-the-business
	HR Systems Strategy RACI Chart	The RACI Chart assists you in organizing roles for carrying out project steps and makes sure there are definite roles that different individuals in the organization must play. Complete this tool to assign project steps to individuals of best-fit. http://www.infotech.com/research/hr-systems-strategy-raci-chart

Type	Document	Description
	HR Systems Health Assessment Tool	This tool will help you build requirements, assess gaps, and rate functional and integration quality of your HR systems. http://www.infotech.com/research/hr-systems-health-assessment-tool
	HR Systems Strategy Roadmap Tool	This tool will help key stakeholders visualize the implementation of HR Tech Implementation initiatives on an easy-to-read timeline. Beyond serving as a mechanism for communication, this tool can aid in the scheduling and tracking of initiatives as needed. http://www.infotech.com/research/hr-systems-strategy-roadmap-tool
	HRIS Selection Case Study for a Large Property Management Firm	Over the course of 50 years, the Company has become one of North America's largest investors, owners, and managers of commercial real estate. The Company's HR information management function was highly fragmented, consisting of a combination of manual and automated processes feeding five distinct vendor-provided HR applications, in addition to several custom-built applications. http://www.infotech.com/research/it-hris-selection-case-study-for-a-large-property-management-firm
	Sample Dress Code Policy	This document's purpose is to define appropriate and inappropriate dress code. Its coverage areas include when the policy applies as well as definitions of appropriate dress in several categories. http://www.infotech.com/research/sample-dress-code-policy
Vendor Landscape: Human Resources Information Systems		
	Vendor Landscape: Human Resources Information Systems	A Human Resources Information System (HRIS) is an integrated software suite designed to manage an organization's HR and related processes. Solutions generally cover time and attendance, workforce management, performance management, talent management, and predictive analytics and reporting. Use this Vendor Landscape to shortlist and select the appropriate vendor for your HR needs. http://www.infotech.com/research/vendor-landscape-human-resources-information-systems
	Vendor Landscape Storyboard: Human Resources Information Systems	A Human Resources Information System (HRIS) is an integrated software suite designed to manage an organization's HR and related processes. Use this research to find an appropriate vendor for your HRIS requirements. http://www.infotech.com/research/vendor-landscape-storyboard-human-resources-information-systems
	Human Resources Information Systems Vendor Shortlist Tool	A Human Resources Information System (HRIS) is an integrated software suite designed to manage an organization's HR and related processes. Use this research to find an appropriate vendor for your HRIS requirements. http://www.infotech.com/research/human-resources-information-systems-vendor-shortlist-tool
Vendor Landscape: Talent Management Solutions		
	Vendor Landscape: Talent Management Solutions	Talent Management (TM) suites are an end-to-end solution; they generally cover recruitment, performance management, learning, and compensation. Use this research to find an appropriate vendor for your TM requirements. http://www.infotech.com/research/vendor-landscape-talent-management-solutions
	Vendor Landscape Storyboard: Talent Management Solutions	Talent Management (TM) suites are an end-to-end solution; they generally cover recruitment, performance management, learning, and compensation. Use this research to find an appropriate vendor for your TM requirements. http://www.infotech.com/research/vendor-landscape-storyboard-talent-management-solutions

Type	Document	Description
	Talent Management Solutions Vendor Shortlist Tool	Talent Management (TM) suites are an end-to-end solution; they generally cover recruitment, performance management, learning, and compensation. Use this research to find an appropriate vendor for your TM requirements. http://www.infotech.com/research/talent-management-solutions-vendor-shortlist-tool

Enterprise Applications: Sales, Marketing, and Customer Service Applications

Type	Document	Description
Vendor Landscape: Enterprise Marketing Management Suites		
	Vendor Landscape: Enterprise Marketing Management Suites	Enterprise Marketing Management (EMM) solutions are built around advanced business intelligence engines with pattern detection and smart decision making features. These features enable marketing departments to deal with the challenge. http://www.infotech.com/research/vendor-landscape-enterprise-marketing-management-suites
	Vendor Landscape Storyboard: Enterprise Marketing Management Suites	Info-Tech evaluated seven competitors in the Enterprise Marketing Management market. http://www.infotech.com/research/it-vendor-landscape-storyboard-enterprise-marketing-management-suites
	Enterprise Marketing Management Vendor Shortlist Tool	This tool allows enterprises to generate a customized shortlist of Enterprise Marketing Management (EMM) vendors based on required capabilities and future requirements for product features, architecture, and usability. http://www.infotech.com/research/it-enterprise-marketing-management-vendor-shortlist-tool

Information Management Research

Information Management: Content & Document Management

Type	Document	Description
Blueprint: Develop a SharePoint Governance Strategy		
	Develop a SharePoint Governance Strategy	SharePoint's explosive popularity has often meant that planning has taken a backseat to deployment, and many enterprises find themselves in a Wild West environment. http://www.infotech.com/research/it-develop-a-sharepoint-governance-strategy
	Storyboard: Develop a SharePoint Governance Strategy	Regardless of version deployed, enterprises are finding out the hard way that SharePoint won't govern itself. http://www.infotech.com/research/it-storyboard-develop-a-sharepoint-governance-strategy
	SharePoint Governance Maturity Assessment	Use Info-Tech's SharePoint Governance Strategy Maturity Assessment to determine which strategic path to follow. http://www.infotech.com/research/sharepoint-governance-maturity-assessment
	SharePoint User Access Management List	Keeping track of user permissions is an arduous process, especially for large-scale SharePoint initiatives. http://www.infotech.com/research/it-sharepoint-user-access-management-list

Type	Document	Description
	SharePoint Annual Audit Template	Info-Tech's SharePoint Annual Audit Template will help you conduct an annual assessment of the existing SharePoint environment. http://www.infotech.com/research/it-sharepoint-annual-audit-template
	SharePoint Governance Plan Template	The SharePoint Governance Plan is the Governance Team's most important deliverable and serves as the underpinning of your entire SharePoint Governance Strategy. http://www.infotech.com/research/it-sharepoint-governance-plan-template
	SharePoint Information Architecture Template	An Information Architecture Template is a critical piece of documentation and a helpful architecture planning tool regardless of whether formal documentation is actually required. http://www.infotech.com/research/it-sharepoint-information-architecture-template
	Avoid SharePoint Peril with a Strong Governance Strategy	Understand the value of SharePoint governance and its available options. http://www.infotech.com/research/it-avoid-sharepoint-peril-with-a-strong-governance-strategy
Blueprint: Develop a Web Content Management Strategy		
	Develop a Web Content Management Strategy	WCM isn't dead yet. In fact, it's thriving by meeting the increasingly diverse needs of the marketing department. Balance the requirements of IT and marketing... just don't overbuy. http://www.infotech.com/research/it-develop-a-web-content-management-strategy
	Storyboard: Develop a Web Content Management Strategy	Web Content Management (WCM) solutions remove the burden of web maintenance from IT while giving marketing new capabilities. However, it's very easy to over-buy an expensive solution that is inappropriate for both IT and Marketing. http://www.infotech.com/research/it-storyboard-develop-a-web-content-management-strategy
	WCM Investment Appropriateness Assessment Tool	WCM is one marketing tool, but is it the right one? http://www.infotech.com/research/it-wcm-investment-appropriateness-assessment-tool
	WCM RFP Scoring Tool	Each Web Content Management (WCM) solution has its own strengths and weaknesses. Use Info-Tech's WCM RFP Scoring Tool to ensure that shortlisted vendors meet your organization's requirements. http://www.infotech.com/research/it-wcm-rfp-scoring-tool
	WCM RFP Template	Web Content Management (WCM) vendors come in many different shapes and sizes. Use Info-Tech's WCM RFP Template to ensure that shortlisted vendors meet your requirements. http://www.infotech.com/research/it-wcm-rfp-template
	WCM Vendor Demonstration Script	Web Content Management (WCM) solutions need to be seen by potential users and administrators. Use Info-Tech's WCM Vendor Demo Script template to ensure that the vendors can deliver the solutions promised in the RFP. http://www.infotech.com/research/it-wcm-vendor-demonstration-script-template
	Crafting a Web Content Management Strategy	Web Content Management (WCM) solutions remove the burden of web maintenance from IT while giving marketing new capabilities. However, it's very easy to over-buy an expensive solution that is inappropriate for both IT and Marketing. http://www.infotech.com/research/it-video-develop-a-web-content-management-strategy

eDiscovery: Ease Compliance through Repeatable Process		
	eDiscovery: Ease Compliance through Repeatable Process	Use this set to help prepare for eDiscovery. Develop a SOP and a set of standard communication templates to guide the conversation with requestors and legal counsel. http://www.infotech.com/research/ease-compliance-through-repeatable-process
	Storyboard: Ease Compliance through Repeatable Process	eDiscovery can be incredibly complex and expensive. IT often treats eDiscovery as legal counsel's issue, but IT is a huge part of the response. http://www.infotech.com/research/it-storyboard-ease-compliance-through-repeatable-process
	Captured Information Sources Report	Use this tool to report the results of the initial results of the search for relevant communications. http://www.infotech.com/research/captured-information-sources-report
	eDiscovery Procedure for Legal Search	Use this template to describe the activities and responsibilities required to effectively respond to a discovery request. http://www.infotech.com/research/it-ediscovery-procedure-for-legal-search
	Initial Request For Application of Legal Hold	This tool is designed as a template for IT to get appropriate information from the Discovery request receiving department or persons. http://www.infotech.com/research/it-initial-request-for-application-of-legal-hold
	Initial Request For Application of Legal Hold - Example	This example is designed as a template for IT to get appropriate information from the Discovery request receiving department or persons. http://www.infotech.com/research/it-initial-request-for-application-of-legal-hold-example
	Information Store Identification and Search Request	This tool is designed as a template for IT to get identify the information sources and search terms that Legal or Compliance have identified. http://www.infotech.com/research/it-information-store-identification-and-search-request
	Document Production Services Request	This tool is designed as a template for IT to get define the redaction and format for the final documents that Legal or Compliance will send to the external requesting agent. http://www.infotech.com/research/it-document-production-services-request
	eDiscovery Procedure for Legal Search	Use this template to describe the activities and responsibilities required to effectively respond to a discovery request. http://www.infotech.com/research/it-ediscovery-procedure-for-legal-search
	eDiscovery Business Case Template	This template is meant to help IT make the case for a formalized eDiscovery process. http://www.infotech.com/research/it-ediscovery-business-case-template
	eDiscovery Process Communication Plan Template	This communication plan template provides a structure for managing ongoing communications between stakeholders over the course of the project. http://www.infotech.com/research/it-ediscovery-process-communication-plan-template
Blueprint: Extend SharePoint to Overcome Key Challenges		
	Extend SharePoint to Overcome Key Challenges	Third-party SharePoint extensions improve the SharePoint experience for users and administrators. Determine if SharePoint alone is the best strategy. http://www.infotech.com/research/it-extend-sharepoint-to-overcome-key-challenges

	Storyboard: Extend SharePoint to Overcome Key Challenges	SharePoint is a large, sprawling application that requires specific customizations or add-ons for optimal functioning. Understand the five key issues that plague SharePoint deployments. http://www.infotech.com/research/it-storyboard-extend-sharepoint-to-overcome-key-challenges
	Extend SharePoint Prioritization Tool	SharePoint is a large, sprawling application that requires specific customizations or add-ons for optimal functioning. Develop a custom list of the potential issues that may affect your SharePoint deployment. http://www.infotech.com/research/it-extend-sharepoint-prioritization-tool
Blueprint: Find Information in the Enterprise		
	Find Information in the Enterprise	The explosion of information in today's organizations is rapidly decreasing employees' ability to find specific content. Build a framework to deal with the mounting problem before it gets any worse. http://www.infotech.com/research/extend-ecm-adoption-and-functionality
	Storyboard: Find Information in the Enterprise	The explosion of information in today's organizations is rapidly decreasing employees' ability to find specific content. Build a framework to deal with the mounting problem before it gets any worse. http://www.infotech.com/research/it-storyboard-find-information-in-the-enterprise
	Content Retention and Disposition Schedule Template	This tool will help you develop a retention and disposition schedule for the information in your enterprise. http://www.infotech.com/research/it-content-retention-and-disposition-schedule-template
Blueprint: Implement an Email and Content Archive Solution		
	Implement an Email and Content Archive Solution	Email-only archiving products are an expensive luxury item - don't do it. Consolidate all of your content into a single archive strategy that enhances information governance and reduces storage costs. http://www.infotech.com/research/implement-an-email-and-content-archive-solution
	Storyboard: Implement an Email and Content Archive Solution	Meeting compliance needs and reducing the impact of content growth on primary storage are concerns for all organizations. http://www.infotech.com/research/storyboard-implement-an-email-and-content-archive-solution
Blueprint: Move Away from File Shares and Organize Enterprise Information		
	Move Away from File Shares and Organize Enterprise Information	Take the first steps towards Information Organization. Balance business, IT, and user requirements to build an effective strategy. Create a rough-cut taxonomy to kick-off search, ECM, or SharePoint projects. http://www.infotech.com/research/it-move-away-from-file-shares-and-organize-enterprise-information
	Storyboard: Move Away from File Shares and Organize Enterprise Information	Take the first steps towards Information Organization. Balance business, IT, and user requirements to build an effective strategy. http://www.infotech.com/research/storyboard-move-away-from-file-shares-and-organize-enterprise-information
	Information Organization Program Manual	The Program Manual serves as the basis for maintaining the Information Organization practice within the enterprise. http://www.infotech.com/research/it-information-organization-program-manual

Vendor Landscape: Process-Generated Content Management		
	Vendor Landscape: Process-Generated Content Management	ECM vendors that focus on process-generated content provide controls for ingesting, moving, and publishing information. These solutions provide strong workflow and access controls to manage content. http://www.infotech.com/research/it-vendor-landscape-enterprise-content-management-for-process-workers
Blueprint: Plan to Deploy SharePoint to the Best-Fit Cloud		
	Plan to Deploy SharePoint to the Best-Fit Cloud	Understand the implications of migrating SharePoint to the cloud by fully evaluating your options. Develop best practices and standard operating procedures for your SharePoint cloud migration that can be applied to other cloud initiatives. http://www.infotech.com/research/it-plan-to-deploy-sharepoint-to-the-best-fit-cloud
	Storyboard: Plan to Deploy SharePoint to the Best-Fit Cloud	Microsoft is saying "To the Cloud!" for your next SharePoint deployment. Decide which cloud model is best for your organization and plan how best to get there. http://www.infotech.com/research/it-storyboard-plan-to-deploy-sharepoint-to-the-best-fit-cloud
	SharePoint TCO Comparison Calculator	This SharePoint TCO Comparison Calculator is designed to aid decision makers in comparing the costs of different deployment methods. http://www.infotech.com/research/it-sharepoint-tco-comparison-calculator
	SharePoint Cloud Appropriateness Assessment	Info-Tech's SharePoint Cloud Appropriateness tool will facilitate discussion and provide recommendations on when cloud deployment is the right move for your organization. http://www.infotech.com/research/it-sharepoint-cloud-appropriateness-assessment
Blueprint: Reintroduce the Information Lifecycle to the Content Management Strategy		
	Reintroduce the Information Lifecycle to the Content Management Strategy	Content is exploding in all directions faster than IT can control it. The new reality is that IT must act to define information movement and move away from classifying content based on source. http://www.infotech.com/research/develop-an-enterprise-content-management-strategy
	Storyboard: Reintroduce the Information Lifecycle to the Content Management Strategy	Before looking into Enterprise Content Management (ECM) solutions, the enterprise needs to fully understand the meaning behind this vendor marketing term. Full-bodied ECM solutions exist all over the market, but that doesn't mean that they are right for every organization. http://www.infotech.com/research/storyboard-develop-an-enterprise-content-management-strategy
	Risk Tool for Enterprise Content Management	This tool will guide you through the process of defining the risks during the development and implementation of a content management strategy. These risks include content sharing issues and technical problems based on existing application and infrastructure. http://www.infotech.com/research/risk-tool-for-enterprise-content-management
	Enterprise Content Management Readiness Assessment Tool	Before taking steps to towards an Enterprise Content Management (ECM) solution, the organization needs to assess its current readiness for taking on this big implementation. Use this tool to determine readiness across three key categories - people, process and technology - by answering a simple questionnaire about key indicators. http://www.infotech.com/research/enterprise-content-management-readiness-assessment-tool

	Information Curator	The role of an Information Curator is to ensure that all content is available for informational use within an organization allowing for information flow to maximize productivity. http://www.infotech.com/research/it-information-curator
	Content Sharing Project Charter	This tool serves to help in gathering requirements from different departments, each of which has individualized needs to share content, and to manage enterprise content. http://www.infotech.com/research/it-content-sharing-project-charter
	Enterprise Content Management Business Plan Template	Business plan creation is essential to obtaining business and executive support for your Enterprise Content Management (ECM) implementation. Use this template to ensure that a full ECM solution is warranted and that a comprehensive corporate strategy is defined. http://www.infotech.com/research/enterprise-content-management-business-plan-template
Blueprint: Right-Size the Information Governance Program		
	Right-Size the Information Governance Program	All business initiatives use or create information. Start governing the information as an asset to ensure success of new business initiatives. http://www.infotech.com/research/right-size-the-information-governance-program
	Storyboard: Right-Size the Information Governance Program	All business initiatives use or create information. Start governing the information as an asset to ensure success of new business initiatives. http://www.infotech.com/research/storyboard-right-size-the-information-governance-program
	Information Governance Prioritization Tool	Use this tool to aid in the design of your information governance program. The tool can be used at each stage of the information governance implementation project. http://www.infotech.com/research/information-governance-prioritization-tool
	Information Source Communication Tool	Use this tool to gather additional information from stakeholders so that you can make informed evaluations on high value information sources. http://www.infotech.com/research/information-source-communication-tool
	Information Governance Charter	Information Governance combines the potentially separate but overlapping areas of Privacy, Security, Data Quality, and Information Management into a single, integrated governance structure to ensure that the full information lifecycle is managed professionally. http://www.infotech.com/research/information-governance-charter
	Low Risk Information Acceptable Use Policy	Start with best practice templates to define the needed policies and end-user guidance. This policy document contains the combined best practices of 15 different organizations across two industries. http://www.infotech.com/research/low-risk-information-acceptable-use-policy
	High Risk Information Acceptable Use Policy	Start with best practice templates to define the needed policies and end-user guidance. This policy document contains the combined best practices of 15 different organizations across two industries. http://www.infotech.com/research/high-risk-information-acceptable-use-policy
	Information Disposition and Retention Policy	Start with best practice templates to define the nature of your retention rules. This policy document contains the combined best practices of four different organizations across four industries. http://www.infotech.com/research/information-disposition-and-retention-policy

Blueprint: Use SharePoint for Enterprise Content Management		
	Use SharePoint for Enterprise Content Management	SharePoint is not a "cheap and cheery" Enterprise Content Management (ECM) solution. It is very popular for collaboration but ECM is a completely different animal; SharePoint ECM projects can be very difficult and surprisingly expensive. Prepare appropriately. http://www.infotech.com/research/evaluate-sharepoint-for-enterprise-content-management
	Storyboard: Use SharePoint for Enterprise Content Management	SharePoint does ECM, but you must develop atypical IT competencies to be successful. SharePoint 2010 is better but it will cost you more than you think to get the full ECM functionality. http://www.infotech.com/research/it-storyboard-use-sharepoint-for-enterprise-content-management
	SharePoint 2010 Readiness Assessment Tool	The SharePoint 2010 Readiness Assessment tool facilitates the decision-making process of upgrading to SharePoint 2010. By gathering information through questions based on functional requirements, hardware, and organizational intricacies, the readiness assessment tool will provide a recommendation on if/when to upgrade to SharePoint 2010 from SharePoint 2003 or 2007. http://www.infotech.com/research/it-sharepoint-development-readiness-assessment-tool
	SharePoint Deployment Plan Tool	SharePoint is landing on the desks of IT leaders everywhere, with the direction to deploy it and make sure everyone uses it. Easier said than done; leverage the Info-Tech "SharePoint Deployment Plan" tool to manage the deployment process and avoid the pitfalls that make implementation tough. http://www.infotech.com/research/sharepoint-deployment-plan
	SharePoint Information Architecture Template	An Information Architecture Template is a critical piece of documentation and a helpful architecture planning tool regardless of whether formal documentation is actually required. http://www.infotech.com/research/it-sharepoint-information-architecture-template
	SharePoint ECM Designer	The SharePoint ECM Designer directly contributes to the efficiency of business processes, the usable presentation of organizational information, and the effective governance of our business collaboration framework and tools. http://www.infotech.com/research/it-job-description-sharepoint-ecm-designer
	Managed Metadata Project Charter Template	This tool serves as a project outline and charter to assist in the creation of managed metadata to manage enterprise content. This document will assist in stating objectives, measuring effectiveness, organizing team members, and establishing project parameters. http://www.infotech.com/research/it-managed-metadata-project-charter
	Descriptors for Document Repositories Template	The Descriptors for Document Repositories Template will assist in developing schedules of descriptors for each purpose identified in the deployment plan. Use this template to track and store the metadata that each department will be restricted to using when describing content. http://www.infotech.com/research/it-descriptors-for-document-repositores-template
	Records Retention Schedule Template	A retention schedule stipulates how long electronic documents and records should be retained by an enterprise. Work with existing records management staff (if applicable), legal counsel, and management to ensure that the stipulated retention periods meet both compliance and operational requirements. http://www.infotech.com/research/records-retention-schedule-template

	Email Archiving Appropriateness Assessment Tool	The email archiving market is a highly fragmented market, with many vendors that are strong in specific areas. Organizations have different needs depending on their industry and geographical location, and are struggling to reconcile their requirements with vendor competencies, as well as choose the right deployment option. http://www.infotech.com/research/e-mail-archiving-appropriateness-assessment-tool
	Content and Email Archiving RFP Template	Start with best practice templates to define the information that you need to solve your archiving needs. This RFP document contains the combined best practices of seven different organizations across four industries. http://www.infotech.com/research/e-mail-archiving-solution-rfp-template
	Email Archiving Vendor Demonstration Script	Use this demonstration script to provide vendors with a consistent set of instructions, ensuring an objective comparison of product features. http://www.infotech.com/research/e-mail-archiving-demonstration-script-template
	ECM Suite Shortlist Preparation Tool	Enterprise Content Management (ECM) is an important but potentially costly technology. Each vendor presents a different set of strengths and weaknesses. Ultimately, ECM success is about fit with the vendors. Use this tool to help create a practical vendor shortlist and pinpoint an ECM suite that fits your enterprise needs. http://www.infotech.com/research/ecm-suite-shortlist-preparation-tool
	ECM Suite RFP Template	An RFP is a formal invitation issued by a business or agency requesting interested vendors to submit written proposals meeting a particular set of requirements. This Enterprise Content Management (ECM) RFP template will help streamline your efforts in preparing and distributing a detailed and effective RFP, to get the most out of prospective vendors. http://www.infotech.com/research/ecm-suite-rfp-template
Vendor Landscape: Content and Email Archiving		
	Vendor Landscape: Content and Email Archiving	Meeting compliance needs, and reducing the impact of content growth on primary storage are concerns for all organizations. Once you have identified the need for a dedicated product compare the top vendors to select the right fit. http://www.infotech.com/research/vendor-landscape-content-and-email-archiving
	Vendor Landscape Storyboard: Content and Email Archiving	Meeting compliance needs, and reducing the impact of content growth on primary storage are concerns for all organizations. Once you have identified the need for a dedicated product compare the top vendors to select the right fit. http://www.infotech.com/research/vendor-landscape-storyboard-content-and-email-archiving
	Content Archiving Vendor Shortlist & Detailed Feature Analysis Tool	This tool allows enterprises to profile their Content Archiving requirements and generate a rank-ordered vendor shortlist from a fixed list of vendors. http://www.infotech.com/research/content-archiving-vendor-shortlist-detailed-feature-analysis-tool
	Content and Email Archiving RFP Template	Start with best practice templates to define the information that you need to solve your archiving needs. This RFP document contains the combined best practices of seven different organizations across four industries. http://www.infotech.com/research/e-mail-archiving-solution-rfp-template
	Email Archiving Vendor Demonstration Script	Use this demonstration script to provide vendors with a consistent set of instructions, ensuring an objective comparison of product features. http://www.infotech.com/research/e-mail-archiving-demonstration-script-template

	Archiving Project Plan Template	Content and email archiving has many potential benefits. The critical issue is that the business users perceive it as the loss of access to their files. This form is part of the communication plan that will allow IT to be transparent about the needs and expectations for adoption of a new archiving strategy. http://www.infotech.com/research/archiving-project-plan-template
	SharePoint 2010 Readiness Assessment Tool	The SharePoint 2010 Readiness Assessment tool facilitates the decision-making process of upgrading to SharePoint 2010. By gathering information through questions based on functional requirements, hardware, and organizational intricacies, the readiness assessment tool will provide a recommendation on if/when to upgrade to SharePoint 2010 from SharePoint 2003 or 2007. http://www.infotech.com/research/it-sharepoint-development-readiness-assessment-tool
Vendor Landscape: Enterprise Content Management for Knowledge Workers		
	Vendor Landscape: Enterprise Content Management for Knowledge Workers	ECM for knowledge workers continues to evolve. Vendors have started to move beyond just document management and social tools to enable user workflows and simple processes. http://www.infotech.com/research/it-vendor-landscape-content-management-for-knowledge-workers
	Vendor Landscape Storyboard: Enterprise Content Management for Knowledge Workers	As the market evolves, capabilities that were once cutting edge become default and new functionality becomes differentiating. This Vendor Landscape will help you focus on the best content management solution for your enterprise needs. http://www.infotech.com/research/it-vendor-landscape-storyboard-content-management-for-knowledge-workers
	ECM for Knowledge Workers Vendor Shortlist Tool	Use this tool to generate a customized shortlist of Content Management vendors based on the importance your organization places on product features and vendor attributes. http://www.infotech.com/research/it-content-management-for-knowledge-workers-vendor-shortlist-tool
	ECM RFP Template	Use this request for proposal (RFP) template to create a formal invitation for Enterprise Content Management (ECM) solution vendors to submit a proposal meeting your ECM requirements. http://www.infotech.com/research/ecm-rfp-template
	ECM Vendor Demo Script	Use this demonstration script to provide Enterprise Content Management solution vendors with a consistent set of instructions, ensuring an objective comparison of product features. http://www.infotech.com/research/ecm-vendor-demo-script
	PGCM Vendor Shortlist & Detailed Feature Analysis Tool	This tool allows enterprises to profile their Process Generated Content Management (PGCM) requirements and generate an ordered vendor shortlist from a fixed list of vendors. http://www.infotech.com/research/pgcm-vendor-shortlist-detailed-feature-analysis-tool
	ECM RFP Template	Use this request for proposal (RFP) template to create a formal invitation for Enterprise Content Management (ECM) solution vendors to submit a proposal meeting your ECM requirements. http://www.infotech.com/research/ecm-rfp-template
	ECM Vendor Demo Script	Use this demonstration script to provide Enterprise Content Management solution vendors with a consistent set of instructions, ensuring an objective comparison of product features. http://www.infotech.com/research/ecm-vendor-demo-script

Vendor Landscape: Web Content Management		
	Vendor Landscape: Web Content Management	Web content management is continuously evolving. Where it once was strictly about deploying websites, it is now about social marketing. http://www.infotech.com/research/select-a-web-content-management-solution
	Vendor Landscape Storyboard: Web Content Management	Web content management (WCM) is about the delivery of content and IT enabling marketing to take control of the creation and management of web content. http://www.infotech.com/research/it-storyboard-select-a-web-content-management-solution
	Web Content Management Vendor Shortlist Tool	Info-Tech conducted its own market evaluation of leading web content management (WCM) vendors. This tool allows enterprises to profile WCM requirements and generate a shortlist of vendors. http://www.infotech.com/research/it-wcm-vendor-shortlist-tool
Vendor Landscape: Web Experience Management		
	Vendor Landscape: Web Experience Management	Websites are no longer just about presenting static content. They are now about creating unique experiences and turning customers into paying fans. http://www.infotech.com/research/it-vendor-landscape-web-experience-management
	Vendor Landscape Storyboard: Web Experience Management	Web Experience Management (WEM) is about engaging website visitors and creating a personal experience tailored to each individual's needs and preferences. Trends in WEM include integrated analytics, predictive content presentation, and campaign management. http://www.infotech.com/research/it-vendor-landscape-storyboard-web-experience-management
	Web Experience Management Vendor Shortlist Tool	Info-Tech conducted its own market evaluation of eight leading Web Experience Management (WEM) vendors. This tool allows enterprises to profile their WEM requirements and generate a shortlist of vendors. http://www.infotech.com/research/it-web-experience-management-vendor-shortlist-tool
Additional Resources		
	Forms Automation Appropriateness Assessment Tool	Different enterprise problems may be solved by different levels of forms automation. Forms automation can enable simplistic department routing or mission-critical enterprise processes. Use this tool to determine the appropriate level of forms automation needed to satisfy project requirements. http://www.infotech.com/research/forms-automation-appropriateness-assessment-tool
	ROI Guide for Document Management	The "ROI Guide for Document Management" measures the quantitative benefits of switching from paper to digital information, including storage costs, employee time-savings, and more. The process of measuring ROI highlights areas where managers can achieve the greatest benefits from adopting a document management solution. http://www.infotech.com/research/roi-guide-for-document-management
	Policy for Employee Use of Social Networks	The use of external social networks (e.g. Facebook, Myspace, LinkedIn) within organizations for business purposes is increasing. Use this policy template to set employee expectations and establish guidelines for appropriate use of these applications. http://www.infotech.com/research/policy-for-employee-use-of-social-networks

▶	Adobe Max 2011 Highlights	Like previous Adobe Max conferences, Max 2011 was vibrant and hopping with the energy of many passionate developers and designers. The overall theme of the conference was clearly mobility and the extension of apps and content across the entire ecosystem of devices. http://www.infotech.com/research/it-adobe-max-2011-highlights
🗋	What to do in the Event of a "Litigation Hold"	A "Litigation Hold" occurs after a lawsuit has been filed against the organization or if one is highly likely. http://www.infotech.com/research/it-what-to-do-in-the-event-of-a-litigation-hold
🖶	Do you have any information related to Meaningful Use legislation?	Reporting and Administration as related to Meaningful Use http://www.infotech.com/research/it-do-you-have-any-information-related-to-meaningful-use-legislation
🖶	Do you have any details about online proctoring?	There are essentially two different forms of Online Proctoring: remote live proctoring and remote web proctoring. Determine what the vendors are currently offering and what works best for your organization. http://www.infotech.com/research/do-you-have-any-details-about-online-proctoring
🗋	Documentation for Business Users: The Minimum Manual	A key consideration for business user training is documentation. Use the minimum manual approach for optimal training results. http://www.infotech.com/research/documentation-for-business-users-the-minimum-manual
🗋	Bust Web Content Management Buzzwords	Web Content Management (WCM) is an important technology that is infested with a plague of vendor-created buzzwords. Break through vendor marketing hype. Recognize the different WCM components to effectively compare different products and negotiate with vendors. http://www.infotech.com/research/bust-web-content-management-buzzwords

Information Management: Data Management

Type	Document	Description
Blueprint: Build an Agile Data Warehouse		
⚙	Build an Agile Data Warehouse	Follow Info-Tech's unique approach to designing and implementing your data warehouse to see early value and increase engagement and buy-in for the warehouse project. http://www.infotech.com/research/build-an-agile-data-warehouse
🗎	Storyboard: Build an Agile Data Warehouse - Executive Brief	Use an Agile approach to build a data warehouse to meet information needs. Understand foundational information, data and technology needs, and build iterations on top to inject business value and to instantiate the data warehouse. http://www.infotech.com/research/storyboard-build-an-agile-data-warehouse-executive-brief
🗎	Storyboard: Build an Agile Data Warehouse - Phase One	Use an Agile approach to build a data warehouse to meet information needs. Understand foundational information, data and technology needs, and build iterations on top to inject business value and to instantiate the data warehouse. http://www.infotech.com/research/storyboard-build-an-agile-data-warehouse-phase-one

Type	Document	Description
	Storyboard: Build an Agile Data Warehouse - Phase Two	Use an Agile approach to build a data warehouse to meet information needs. Understand foundational information, data and technology needs, and build iterations on top to inject business value and to instantiate the data warehouse. http://www.infotech.com/research/storyboard-build-an-agile-data-warehouse-phase-two
	Agile Data Warehouse Measurement Plan	When success is not measured, the project ROI can't be calculated. Use the Agile Data Warehouse Measurement Plan to quantify and share the success of your data warehousing program. http://www.infotech.com/research/agile-data-warehouse-measurement-plan
	Data Source Inventory Tool	The Data Source Inventory Tool will help you document relevant information pertaining to each data source to act as a point of reference document. http://www.infotech.com/research/it-data-source-inventory-tool
	Business Glossary	Collecting and documenting business entities helps your data warehousing initiative by giving you clear direction on how to model business entities, how to understand the relationships among them, and how to build analytics around them. http://www.infotech.com/research/business-glossary
	Data Architecture Planning Tool	The Data Architecture Planning Tool surveys the organizations on data landscape and information needs. Based on the survey results, the tool will select the most suitable data architecture for further discussion. http://www.infotech.com/research/data-architecture-planning-tool
	Information Needs Planning Tool	The Information Needs Planning Tool helps organizations to gather high level information needs and elaborate those needs into concrete requirements. http://www.infotech.com/research/information-needs-planning-tool
	Iteration Scorecard	An iteration has a start and an end. Wrapping up an iteration in a quantifiable way helps the project team decide whether to close off the iteration, modify the iteration, or redo the iteration. This Iteration Scorecard is designed to evaluate an iteration at its completion in five areas: People, Process, Data, Deliverables, and Documentation. http://www.infotech.com/research/iteration-scorecard
	Agile Data Warehouse Business Case Presentation	Generating management buy-in for your data warehouse is imperative for launching the initiative. Use this business case presentation to showcase the benefits of data warehousing and address any concerns stakeholders may have. http://www.infotech.com/research/agile-data-warehouse-business-case-presentation
	Agile Data Warehouse Communication Planning Template	Building awareness and support for data warehousing across the organization will take a coordinated communication effort. Use the Agile Data Warehouse Communication Planning Template to document and prepare for all major stakeholder interactions. http://www.infotech.com/research/agile-data-warehouse-communication-planning-template
	Agile Data Warehouse Project Charter Template	Ensure the data warehouse project receives the appropriate resources, funding, and approval by using the Agile Data Warehouse Project Charter Template. http://www.infotech.com/research/agile-data-warehouse-project-charter-template
	Agile Data Warehouse Project Plan Template	Using the Project Plan Template will ensure the Agile data warehouse project is tackled systematically and short Agile iterations are executed to churn out business value. http://www.infotech.com/research/agile-data-warehouse-project-plan-template

Type	Document	Description
	Agile Data Warehouse Service Level Agreement	A data warehouse is the central place to provision data to analytics and business users. Use this Agile Data Warehouse Service Level Agreement (SLA) template to effectively communicate service agreements to end users. http://www.infotech.com/research/agile-data-warehouse-service-level-agreement
	Agile Data Warehouse Strategy and Roadmap	Using the Strategy and Roadmap template will ensure the Agile data warehouse project is tackle systematically and Agile iterations that are short are executed to churn out business value. http://www.infotech.com/research/agile-data-warehouse-strategy-and-roadmap
	Agile Data Warehouse Technology Capability Map	Your Agile data warehouse project requires a technology stack to provide the computing power. The Agile data warehouse technology capability map helps you to plan technology capabilities to support your data warehouse. http://www.infotech.com/research/agile-data-warehouse-technology-capability-map
Blueprint: Develop and Implement an Effective Data Management Strategy and Roadmap		
	Develop and Implement an Effective Data Management Strategy	This Blueprint will help you make sense of your data; where you have gaps in data management, how to close them effectively, and leverage data to give you a competitive advantage. http://www.infotech.com/research/develop-and-implement-an-effective-data-management-strategy
	Storyboard: Develop and Implement a Data Management Strategy and Roadmap	Use this storyboard to develop your Data Management Strategy and create a set of initiatives that consider your organization's business needs and current capabilities. http://www.infotech.com/research/storyboard-develop-and-implement-a-data-management-strategy-and-roadmap
	Chief Data Officer	Use this template to outline the responsibilities and requirements for the Chief Data Officer role. This template can help you identify an individual within your organization that can champion Data Management policies or support your organization in hiring a qualified individual for the position. http://www.infotech.com/research/chief-data-officer
	Data Management Building Block Resource	Use these building block cards to provide more information for the Data Management building blocks and promote more discussion and review as you select building blocks for your future initiatives. Use this resource to support your organization's completion of the Data Management Strategic Initiative Planning Tool. http://www.infotech.com/research/data-management-building-block-resource
	Data Management Capabilities Assessment Tool	This tool will help to identify the current capabilities of your organization's Data Management disciplines and determine the respective maturities that will best enable your IT Data Management Strategy to support your business goals and objectives. http://www.infotech.com/research/data-management-capabilities-assessment-tool
	Data Management Capability Assessment Handout	Use this resource to support your organization's facilitation of your own Data Management Strategy workshop or collaborative planning meetings to identify your current state and future state needs regarding data. http://www.infotech.com/research/data-management-capability-assessment-handout

Type	Document	Description
	Data Management Communication Plan Template	Use this template to ensure buy-in and approval for your planned Data Management initiatives. A communication plan will help to convey the value for your initiatives and identify how to ensure successful organizational change management as the initiatives are implemented. http://www.infotech.com/research/data-management-communication-plan-template
	Data Management Interview Guide	Use this interview guide to engage business stakeholders and uncover the Data Management issues that they are currently experiencing. Identify the business drivers that holds the largest importance for your organization: Trust, Availability, Security, or Compliance. http://www.infotech.com/research/data-management-interview-guide
	Data Management Project Charter	Use your Data Management Project Charter to plan your project, engage participants, and control the timeline and delivery of your final project deliverables. http://www.infotech.com/research/data-management-project-charter
	Data Management Review Guide	Use this template to assist your organization as you perform a Data Management review assessing the current treatment of your organization's data. Follow the template to assess the different disciplines of Data Management and uncover performance gaps. http://www.infotech.com/research/data-management-review-guide
	Data Management Roadmap Presentation Template	Use this template to introduce the value of your planned initiatives and gain the approval of critical business or project stakeholders. http://www.infotech.com/research/data-management-roadmap-presentation-template
	Data Management Strategic Initiative Planning Tool	Use this tool to select the building blocks that you will use to design your Data Management initiatives. http://www.infotech.com/research/data-management-strategic-initiative-planning-tool
	Data Management Strategy and Roadmap Template	This template will be used for planning your Data Management Strategy and outlining the associated initiatives. http://www.infotech.com/research/data-management-strategy-and-roadmap-template
	Initiative Definition Tool	When creating initiatives, all components of the initiative - from its objective to the benefits and costs - need to be considered. Use this template to map out the goal, objectives, benefits, payoff, and cost of each initiative. http://www.infotech.com/research/initiative-definition-tool
Blueprint: Establish Effective Data Governance		
	Establish Effective Data Governance	The amount of data within an organization is growing at an exponential rate, creating a need for organizations to adopt a formal approach to governing their data. However, many companies remain uninformed on how to manage their data. In order to maximize the benefits of data as an asset, comprehensive management in the form of policies, processes, standards, and ownership is required. http://www.infotech.com/research/establish-effective-data-governance
	Storyboard: Establish Effective Data Governance	Data Governance is a strategic program that will help your organization control data by managing the people, processes, and technology needed to ensure that accurate and consistent data policies exist across varying lines of business within your organization. http://www.infotech.com/research/storyboard-establish-effective-data-governance

Type	Document	Description
	Chief Data Officer	Use this template to outline the responsibilities and requirements for the Chief Data Officer role. This template can help you identify an individual within your organization that can champion Data Management policies or support your organization in hiring a qualified individual for the position. http://www.infotech.com/research/chief-data-officer
	Data Governance Implementation Plan Template	Use the Data Governance Implementation Plan Template to move forward with establishing Data Governance. This template should be used in conjunction with the Data Governance Implementation Planning Tool. http://www.infotech.com/research/data-governance-implementation-plan-template
	Data Governance Implementation Planning Tool	Plan the sequence, starting time, and length of each initiative in the Data Governance Implementation Planning Tool. The tool will generate a GANTT chart based on the start and length of each initiative. http://www.infotech.com/research/data-governance-implementation-planning-tool
	Data Integration and Virtualization Policy	The purpose of this policy is to ensure that organizations mitigate risks to personal privacy when integrating, replicating, or virtualizing personal data, and only integrates, replicates, or virtualizes data when necessary. http://www.infotech.com/research/it-data-integration-and-virtualization-policy
	Data Governance Project Charter Template	A project charter serves several important functions. It organizes the project so that you can make efficient and effective resource allocation decisions. It also communicates important details about the project purpose, scope definition, and the project parameters. http://www.infotech.com/research/data-governance-project-charter-template
	Data Governance Requirements Gathering Tool	Your data governance efforts are largely impacted by the organization's data requirements. Identifying the requirements will provide greater direction for the data governance strategy and implementation. http://www.infotech.com/research/data-governance-requirements-gathering-tool
Blueprint: Implement Information Lifecycle Management		
	Implement Information Lifecycle Management	Organizations should address information lifecycle management at the business process level, as opposed to the department level, in order to capture a holistic view of the information across different functional groups. http://www.infotech.com/research/implement-information-lifecycle-management
	Storyboard: Implement Information Lifecycle Management	With the growth of unstructured information, the mounting regulatory pressures, and the rise of shadow IT, organizations can no longer afford to put information lifecycle management off. http://www.infotech.com/research/storyboard-implement-information-lifecycle-management
	Communications and Training Planning Template	Developing a communication and training plan is the best way to ensure a clear and concise message about ILM reaches the intended audience. http://www.infotech.com/research/communications-and-training-planning-template
	Information Catalog and Analytics Template	The Information Catalog and Analytics Template helps organize and navigate information. It presents a comprehensive list of all available types of information created, received, processed, and stored by an organization. http://www.infotech.com/research/information-catalog-and-analytics-template

Type	Document	Description
	Information Lifecycle Management Audit Template	An ILM audit should be conducted regularly to validate compliance of ILM policies and procedures and to identify deficiencies. This ILM audit template helps organizations plan for and conduct ILM audits. http://www.infotech.com/research/information-lifecycle-management-audit-template
	Information Lifecycle Management Planning Tool	This tool will assess each business process for its significance to the business and risk of being noncompliant with regulatory requirements. The tool can also help organizations track regulatory requirements and gauge the maturity of current ILM practices. http://www.infotech.com/research/information-lifecycle-management-planning-tool
	Project Metric Tracking Tool	Proper benefits tracking and monitoring plays a critical role in ensuring that expected benefits are realized after a project is implemented. http://www.infotech.com/research/project-metric-tracking-tool
	Project Planning and Monitoring Tool	The beginning stages of the project are dedicated to working out the details of the project task schedule. Take advantage of this tool to determine and create a detailed project plan outlining how the project will progress. http://www.infotech.com/research/project-planning-and-monitoring-tool
	Information Lifecycle Management Policy	This policy on ILM provides direction for managing information as a valuable and strategic resource. It shows an organization is committed to establishing and maintaining information and records management practices that meet its business needs, accountability requirements and stakeholder expectations. http://www.infotech.com/research/information-lifecycle-management-policy
	Information Lifecycle Management Project Charter Template	A project charter serves several important functions. It organizes the information lifecycle management project so that you can make efficient and effective resource allocation decisions. It also communicates important details about the project purpose, scope definition, and the project parameters. http://www.infotech.com/research/information-lifecycle-management-project-charter-template
	Information Lifecycle Management Resourcing Plan	This resourcing plan is designed to assist organizations in staffing the ILM project, ILM program and ad-hoc consultation in order to obtain the skills necessary to drive ILM initiatives. http://www.infotech.com/research/information-lifecycle-management-resourcing-plan
	Information Lifecycle Management Solution Evaluation Template	An evaluation template is an important component of the ILM solution selection process. This template provides guidance on how to craft a standard demo script to be used by the ILM project team for the ILM selection process. http://www.infotech.com/research/information-lifecycle-management-solution-evaluation-template
Blueprint: Optimize the Organization's Data Integration Practices		
	Optimize the Organization's Data Integration Practices	This project reviews the different integration patterns and trends that are being explored and leveraged by businesses today. Understand your own business's data integration needs and use this knowledge to help develop integration practices that will empower it through more effective use of its data. http://www.infotech.com/research/optimize-the-organization-s-data-integration-practices

Type	Document	Description
	Storyboard: Optimize the Organization's Data Integration Practices	This storyboard will guide your organization through the analyzing current data integration practices and updating current practices using patterns and improved governance. It will walk through project structuring, requirements gathering, current state analysis, selecting integration patterns, and implementing increased governance around data integrations. http://www.infotech.com/research/storyboard-optimize-the-organization-s-data-integration-practices
	Data Integration Business Case Template	Data integration can be a tough sell on its own. Use and adapt this business case to help articulate the value and necessity of investing in data integration. http://www.infotech.com/research/data-integration-business-case-template
	Data Integration Pattern Selection Tool	This tool will help your organization identify the integration patterns that best fit specific integration scenarios within the business. http://www.infotech.com/research/data-integration-pattern-selection-tool
	Data Integration Project Charter Template	A project charter serves several important functions, including organizing your data integration planning project so that you can make efficient and effective resource allocation and investment decisions. http://www.infotech.com/research/data-integration-project-charter-template
	Initiative Definition Tool	When creating initiatives, all components of the initiative - from its objective to the benefits and costs - need to be considered. Use this template to map out the goal, objectives, benefits, payoff, and cost of each initiative. http://www.infotech.com/research/initiative-definition-tool
	Data Integration and Virtualization Policy	The purpose of this policy is to ensure that organizations mitigate risks to personal privacy when integrating, replicating, or virtualizing personal data, and only integrates, replicates, or virtualizes data when necessary. http://www.infotech.com/research/it-data-integration-and-virtualization-policy
	Data Integration Mapping Tool	If your integration tool does not have a catalog or metadata repository to store all mappings used across the organization, this tool can be used to document the mappings and allow them to be stored in a content and/or knowledge management system. http://www.infotech.com/research/data-integration-mapping-tool
	Integration Center of Competency Charter Template	Establishing an Integration Center of Competency is an important component of the implementation of application integration governance. This charter outlines its purpose, agenda, membership, and mandate so there is no ambiguity about governance. http://www.infotech.com/research/it-integration-center-of-competency-charter
Blueprint: Develop a Pattern-Based Big Data Strategy to Accelerate Big Data Value		
	Develop a Pattern-Based Big Data Strategy to Accelerate Big Data Value	Implementing a big data plan can help organizations become more data-driven, analytical, and strategic. Using Info-Tech Research Group's four big data patterns to get started on your big data project will increase buy-in and reduce implementation time. http://www.infotech.com/research/it-develop-a-pattern-based-big-data-strategy-to-accelerate-big-data-value
	Storyboard: Develop a Pattern-Based Big Data Strategy to Accelerate Big Data Value	Implementing a big data plan can help organizations become more data-driven, analytical, and strategic. Using Info-Tech Research Group's four big data patterns to get started on your big data project will increase buy-in and reduce implementation time. http://www.infotech.com/research/it-storyboard-develop-a-pattern-based-big-data-strategy-to-accelerate-big-data-value

Type	Document	Description
	Big Data Maturity Assessment Tool	This tool will help your organization assess its maturity and readiness for big data. http://www.infotech.com/research/it-big-data-maturity-assessment-tool
	Big Data Cost/Benefit Tool	This tool will help your organization perform a cost/benefit analysis on its big data initiative. http://www.infotech.com/research/it-big-data-costbenefit-tool
	Big Data Business Case Template	This template can be used to develop a complete business case for the big data initiative. http://www.infotech.com/research/it-big-data-business-case-template
	Big Data Maturity Assessment Tool	This tool will help your organization assess its maturity and readiness for big data. http://www.infotech.com/research/it-big-data-maturity-assessment-tool
	Pattern Analysis Template	This template will help organizations identify which big data patterns solve which business issues. You can then evaluate the benefits of each pattern, which will help you determine the pattern that will drive their big data project. http://www.infotech.com/research/it-pattern-analysis-template
	Cost of Poor Data Calculator	How much is your bad data impacting your business? This tool is intended to help you quantify the answer to that question. It designed to estimate how much money is being leaked from your organization as a result of poor data quality, as well as the cost of data that depreciates in your system over time. http://www.infotech.com/research/cost-of-poor-data-calculator
	Manage and Maintain Data Quality Standard Operating Procedure	The Manage and Maintain SOP is a fully customizable template outlining the procedure to manage the quality of your organization's data. You can apply this SOP when plugging the holes in any data system. http://www.infotech.com/research/manage-and-maintain-data-quality-standard-operating-procedure
	Data Quality Management Project Charter Template	The project will not launch without executive support. This template is designed to effectively and efficiently portray the information to help you gain the support of your executive stakeholders to undergo the arduous task of managing the quality of your organization's data. http://www.infotech.com/research/data-quality-management-project-charter-template
	Clean & Correct Data Systems Standard Operating Procedure	Even if you have strong data maintenance practices in place, the data in your system will still depreciate over time. The Clean & Correct Data Systems SOP is a fully customizable template outlining the procedure for cleaning the defective data in your organization's data systems. You can apply this SOP to any clean-up effort going forward. http://www.infotech.com/research/clean-correct-data-systems-standard-operating-procedure
Blueprint: Build an Efficient Data Warehouse that Delivers Value		
	Build an Efficient Data Warehouse that Delivers Value	For organizations that are starting the data warehouse journey this blueprint will help their IT professionals to plan and execute a project to build an efficient, cost-effective data warehouse. http://www.infotech.com/research/build-an-efficient-data-warehouse-that-delivers-value

Blueprint: Perform a Data Audit		
	Perform a Data Audit	The amount of data within an organization is growing at an exponential rate, creating a need for organizations to adopt a formal approach to auditing data. This is the first step an organization should take towards treating data as an asset and leveraging it to create a competitive advantage. http://www.infotech.com/research/perform-a-data-audit
	Storyboard: Perform a Data Audit	Perform a data audit to uncover data issues that are likely leading to business inefficiencies. This project will walk you through best practices for planning and executing an effective data audit in only a few days. http://www.infotech.com/research/storyboard-perform-a-data-audit
	Data Audit Project Charter	The data audit project will not launch without a solid structure and executive support. This template is designed to effectively and efficiently portray information pertaining to the objectives, goals, and scope of the project. http://www.infotech.com/research/data-audit-project-charter
	Data Audit Scorecard	The Data Audit Scorecard identifies the areas in which the health of your data can be modified for improvement. Use this template to see where you fall short so you can properly focus your optimization efforts. http://www.infotech.com/research/data-audit-scorecard
	Data Audit Interview Schedule	Use the Data Audit Interview Schedule to ensure you organize interviews with the proper data audit participants. http://www.infotech.com/research/data-audit-interview-schedule
	IT Data Audit Report Guidance	Use this template to determine what needs to be executed within the scope of the data audit. http://www.infotech.com/research/it-data-audit-report-guidance
	Data Audit Stakeholder Interview Guide	Data owners, data stewards, and end users are the ones who use the data on a day-to-day basis and will be able to provide the best information regarding ongoing data issues. Use this guide to complete user profiling. http://www.infotech.com/research/data-audit-stakeholder-interview-guide
	Data Change Communication Plan Template	The Data Change Communication Plan will help ensure stakeholders are aware of the data changes happening, how it will affect them, and when it will occur. The Communication Plan will work to provide a smooth roll out of all data initiatives. http://www.infotech.com/research/it-data-change-communication-plan-template
	Data Source Inventory Tool	The Data Source Inventory Tool will help you document relevant information pertaining to each data source to act as a point of reference document. http://www.infotech.com/research/it-data-source-inventory-tool
Blueprint: Tackle Data Quality Issues		
	Storyboard: Tackle Data Quality Issues	Despite the costs and headaches associated with having poor data, most organizations struggle to define and implement a strategy for effectively improving data quality. http://www.infotech.com/research/it-storyboard-tackle-data-quality-issues

Information Management: Data Optimization

Type	Document	Description
Blueprint: Assess Oracle's Role in the Enterprise Database Strategy		
	Assess Oracle's Role in the Enterprise Database Strategy	Oracle Database costs more than other platforms. Many organizations have their hands tied when it comes to choice in databases, but they still miss opportunities for cutting down to less expensive versions of Oracle. http://www.infotech.com/research/it-assess-oracles-role-in-the-enterprise-database-strategy
	Storyboard: Assess Oracle's Role in the Enterprise Database Strategy	Develop a strategy that simplifies Oracle's role in your database collection, in addition to dealing with challenges before they become problems. http://www.infotech.com/research/it-storyboard-assess-oracles-role-in-the-enterprise-database-strategy
	Determine Enterprise Encryption Readiness to Keep Data out of Danger	Enterprises of all sizes must now comply with legislation and policies set by privacy groups that require sensitive data to be encrypted. Understand the implications of these policies and assess the enterprise's need and state of readiness for data encryption. http://www.infotech.com/research/determine-enterprise-encryption-readiness-to-keep-data-out-of-danger
	Data Encryption Readiness Assessment	Legislation and growing demands from privacy groups are forcing companies of all sizes and industries to encrypt their sensitive data. This Excel tool is designed to assess the enterprise's need and state of readiness for data encryption. http://www.infotech.com/research/database-encryption-readiness-assessment
	Discover Microsoft SQL Server 2012: A Quick Primer	This primer provides a quick look at the features and licensing of SQL Server 2012, and addresses any caveats associated with upgrading from an earlier version of SQL Server. http://www.infotech.com/research/it-discover-microsoft-sql-server-2012-a-quick-primer
	Oracle TCO Tool	Use this tool to determine the Total Cost of Ownership (TCO) of Oracle Database running on various systems, and to compare it with viable competitor platforms. http://www.infotech.com/research/it-oracle-tco-tool
	Database Inventory Tool	Use the database inventory tool to keep track of the applications and infrastructure that connect to your databases. http://www.infotech.com/research/it-database-inventory-tool
	Oracle Necessity Assessment Tool	Oracle is expensive. Use this tool to determine if Oracle Database is necessary for your organization, or if you can consider less expensive options. http://www.infotech.com/research/it-oracle-necessity-assessment-tool
Blueprint: Build a Strategy for Big Data Platforms		
	Build a Strategy for Big Data Platforms	The big data market is still in its infancy and many organizations don't yet understand how big data tools fit in with their existing data management strategies. Big data tools are not a fit for every use case and knowing when and how to lead a deployment is essential. Create a data management strategy that starts with a business problem and provides the appropriate tools to allow the business to gain valuable insight from new and existing data sources. http://www.infotech.com/research/build-a-strategy-for-big-data-platforms
	Storyboard: Build a Strategy for Big Data Platforms	This research allows organizations to successfully identify if they have the need for NoSQL solutions and develop a big data strategy around their use case. http://www.infotech.com/research/it-storyboard-build-a-strategy-for-big-data-platforms

Type	Document	Description
	Scale Up vs. Scale Out TCO Tool	Use this tool to play with the pre-populated values, or insert your own amounts to compare possible database decisions, and determine the TCO of scaling up or out for open-source Apache Cassandra. http://www.infotech.com/research/it-scale-up-vs-scale-out-tco-tool
	Big Data Diagnostic Tool	Use this tool to evaluate your readiness to implement NoSQL, based on your data requirements and internal IT and business capabilities. http://www.infotech.com/research/it-big-data-diagnostic-tool
Blueprint: Consolidate Databases using Microsoft SQL Server		
	Consolidate Databases using Microsoft SQL Server	Although database consolidation has historically been thought of as a risky practice, recent improvements to SQL Server make it a much more reliable platform for consolidation. Organizations not yet consolidating are wasting resources. The value of consolidation extends beyond cost savings; organizations can also achieve more centralized management and a more efficient and effective use of their data center space. A successful consolidation requires careful planning and a structured process. http://www.infotech.com/research/it-consolidate-databases-using-microsoft-sql-server
	Storyboard: Consolidate Databases using Microsoft SQL Server	Database consolidation is an effective cost-cutting solution for organizations' infrastructures, but it is also a large-scale project that requires a clear strategic roadmap and effective planning. This research allows organizations to select a proper consolidation strategy and to implement it in a step-by-step process. http://www.infotech.com/research/it-consolidate-databases-onto-microsoft-sql-server-storyboard
	Database Consolidation Inventory Tool	Use this tool as a guideline for capturing your current database inventory. You can easily extend this tool to incorporate information specific to your environment. http://www.infotech.com/research/it-database-consolidation-inventory-tool
	Database Consolidation Decision Tree	Use this tool as a framework for selecting a consolidation model based on your consolidation priorities. http://www.infotech.com/research/it-database-consolidation-decision-tree
Blueprint: Manage and Maintain Data Quality		
	Manage and Maintain Data Quality	Data Quality is an issue that has plagued organizations for decades. The issue is so pervasive that most organizations turn a blind eye to their data quality woes. The time is now to gain a competitive edge by improving your decision making and reputation by giving your data a major facelift. http://www.infotech.com/research/manage-and-maintain-data-quality
	Storyboard: Manage and Maintain Data Quality	Data Quality is an issue that has plagued organizations for decades. The issue is so pervasive that most organizations turn a blind eye to their data quality woes. The time is now to gain a competitive edge by improving your decision making and reputation by giving your data a major facelift. http://www.infotech.com/research/storyboard-manage-and-maintain-data-quality
	IT Data Audit Report Guidance	Use this template to determine what needs to be executed within the scope of the data audit. http://www.infotech.com/research/it-data-audit-report-guidance
	Data Audit Interview Schedule	Use the Data Audit Interview Schedule to ensure you organize interviews with the proper data audit participants. http://www.infotech.com/research/data-audit-interview-schedule

Type	Document	Description
	Data Audit Stakeholder Interview Guide	Data owners, data stewards, and end users are the ones who use the data on a day-to-day basis and will be able to provide the best information regarding ongoing data issues. Use this guide to complete user profiling. http://www.infotech.com/research/data-audit-stakeholder-interview-guide
	Data Integration and Virtualization Policy	The purpose of this policy is to ensure that organizations mitigate risks to personal privacy when integrating, replicating, or virtualizing personal data, and only integrates, replicates, or virtualizes data when necessary. http://www.infotech.com/research/it-data-integration-and-virtualization-policy
	Data Source Inventory Tool	The Data Source Inventory Tool will help you document relevant information pertaining to each data source to act as a point of reference document. http://www.infotech.com/research/it-data-source-inventory-tool
Blueprint: Use DBaaS to Drag, Drop, and Deploy Enterprise Databases		
	Use DBaaS to Drag, Drop, and Deploy Enterprise Databases	An increasing number of vendors are offering cloud-based databases as a Database-as-a-Service (DBaaS) product. Outsourcing part of your database management can yield benefits; however, organizations must be carefully outsourcing what they cannot manage in-house. http://www.infotech.com/research/it-use-dbaas-to-drag-drop-and-deploy-enterprise-databases
	Storyboard: Use DBaaS to Drag, Drop, and Deploy Enterprise Databases	Vendors are increasingly starting to offer databases in the Cloud as a fully managed service. Carefully investigate whether any of their offerings match your database needs. http://www.infotech.com/research/it-storyboard-use-dbaas-to-drag-drop-and-deploy-enterprise-databases
	Database as a Service TCO Calculator	Use this TCO calculator to evaluate the true cost differences between an on-premise and a Database as a Service (DBaaS) offering. http://www.infotech.com/research/it-database-as-a-service-tco-calculator
Blueprint: Structure the Role of the DBA		
	Structure the Role of the DBA	Stay one step ahead. Understand how Database Administrator roles are evolving. http://www.infotech.com/research/it-structure-the-role-of-the-dba
	Storyboard: Structure the Role of the DBA	With changes in the technological landscape, the role of the Database Administrator is changing and IT leaders must understand these changes and how they will affect their organizations. http://www.infotech.com/research/it-storyboard-structure-the-role-of-the-dba
	Application Database Administrator	This Application Database Administrator job description outlines the responsibilities involved with the position, including all aspects of the usage of databases in the logical realm. http://www.infotech.com/research/it-application-database-administrator-job-description
	System Database Administrator	The System Database Administrator is to be responsible for the support aspects of data management. http://www.infotech.com/research/it-system-database-administrator-job-description
Blueprint: Upgrade to Microsoft SQL Server 2008 R2		
	Upgrade to Microsoft SQL Server 2008 R2	Organizations running an SQL database rely heavily on it to function properly for business continuity purposes. An upgrade can be costly if it results in major downtime and significant application rework. Use this solution set to make the transition a smooth one. http://www.infotech.com/research/upgrade-to-microsoft-sql-server-2008-r2

Type	Document	Description
	Storyboard: Upgrade to Microsoft SQL Server 2008 R2	SQL 2008 R2 is a promising upgrade candidate for organizations that currently have a Software Assurance agreement with Microsoft, or require BI functionality but lack the budget to implement. Get started on the SQL Server upgrade initiative by understanding the process including the initial planning phases, discovery, execution, and project closure. http://www.infotech.com/research/it-storyboard-upgrade-to-microsoft-sql-server-2008-r2
	SQL Server Upgrade Project Charter	An SQL Server upgrade project charter is essential to the planning phase of the project to identify scope, and hit the ground running. It lays out important information along with real world examples, such as the project description, key success factors, potential risks, stakeholders, communications plan, and decision rights. Complete the charter before the project commences. http://www.infotech.com/research/it-sql-server-upgrade-project-charter
	SQL Server Upgrade Issue Resolution & Change Order Template	Whether the SQL Server upgrade project requires one weekend or many to complete, it is important to collect and document all issues, resolutions, and changes experienced throughout the process to learn from and improve upon in future projects. Use this template to record the lessons learned and change requests throughout the project. http://www.infotech.com/research/it-sql-server-upgrade-issue-resolution-change-order-template

Project Management Office Research

Project Management Office: Project Management

Type	Document	Description
Blueprint: Develop a Resource Management Strategy for the New Reality		
	Develop a Resource Management Strategy for the New Reality	To properly allocate project work and establish more stable project timelines, PMOs need to develop a reasonable and manageable approximation of resource supply and demand. This blueprint will help you to tailor your Resource Management strategy based on your own capacity to manage the data. http://www.infotech.com/research/develop-a-resource-management-strategy-for-the-new-reality
	Storyboard: Develop a Resource Management Strategy for the New Reality	Reclaim project capacity with realistic resource management. http://www.infotech.com/research/storyboard-develop-a-resource-management-strategy-for-the-new-reality
	PMO Coordinator	Use this template to hire a PMO coordinator for your organization. http://www.infotech.com/research/pmo-coordinator
	Resource Management Roadmap	Use this as a template to record your resource management roadmap decisions and present this information to stakeholders. http://www.infotech.com/research/resource-management-roadmap
	Resource Management Strategy	Use this template to record your resource management strategy decisions. http://www.infotech.com/research/resource-management-strategy
	Project Portfolio Workbook	Use this workbook as a model or first iteration for your home-grown PPM solution. Follow the steps in Info-Tech's Grow Your Own PPM Solution blueprint to populate, customize, and extend this tool to suit your needs. http://www.infotech.com/research/project-portfolio-workbook

Type	Document	Description
	Time Audit Workbook	Use this tool to document the results of your Current State Assessment and Time Audit Survey. http://www.infotech.com/research/time-audit-workbook
	Time-Tracking Survey Email Template	Use this template to send regular time-audit survey updates. http://www.infotech.com/research/time-tracking-survey-email-template
Blueprint: Govern and Manage an Enterprise Software Implementation		
	Govern and Manage an Enterprise Software Implementation	Don't outsource your brain. Plan for risks, and assume greater accountability over your project in order to overcome common software implementation pitfalls. http://www.infotech.com/research/govern-and-manage-an-enterprise-software-implementation
	Storyboard: Govern and Manage an Enterprise Software Implementation	Don't outsource your brain. Plan for risks, and assume greater accountability over your project in order to overcome common software implementation pitfalls. http://www.infotech.com/research/storyboard-govern-and-manage-an-enterprise-software-implementation
	Large Software Implementation Maturity Assessment Tool	Knowing where you stand with previous COTS implementations is critical before you can take a more systematic approach in the future. This tool will help you get there with a full maturity assessment. http://www.infotech.com/research/large-software-implementation-maturity-assessment-tool
	Project Lessons Learned Document	Documenting lessons learned in each stage gate of a COTS implementation is a must: this template makes it easy to do so. http://www.infotech.com/research/project-lessons-learned-document
	Project Phases Entry and Exit Criteria Checklist Tool	Assess if you're ready to enter 'and exit' each stage in a COTS implementation. http://www.infotech.com/research/project-phases-entry-and-exit-criteria-checklist-tool
	Project Success Measurement Tool	You can't measure what you don't measure. Leverage this tool for an honest feedback of COTS project success. http://www.infotech.com/research/project-success-measurement-tool
	Risk Mitigation Plan Template	Identifying risks and pitfalls 'and mitigating them' is crucial in a COTS implementation. Use this template to develop a game plan for COTS risk mitigation. http://www.infotech.com/research/risk-mitigation-plan-template
Blueprint: Manage a Minimum-Viable PMO		
	Manage a Minimum-Viable PMO	If your organization designates people 'project managers' but doesn't allocate time to project management duties, you can use this blueprint to find the right balance of discipline and tools to drive project success. http://www.infotech.com/research/manage-a-minimum-viable-pmo
	Storyboard: Manage a Minimum-Viable PMO	Provide project managers with processes that they have the time to follow. http://www.infotech.com/research/storyboard-manage-a-minimum-viable-pmo
	Minimum-Viable PMO Needs Assessment	Analyze the value of the time and effort you spend on project management activities. http://www.infotech.com/research/minimum-viable-pmo-needs-assessment
	Minimum-Viable Project and Portfolio Management SOP	Rather than just another project document, make your SOP the key to your survival guide. http://www.infotech.com/research/minimum-viable-project-and-portfolio-management-sop

Type	Document	Description
	Zero-Allocation Project Management Survival Guide	The most viable and effective way to ensure project manager compliance with the portfolio reporting process is to incorporate activities that create value by helping them manage their projects. http://www.infotech.com/research/zero-allocation-project-management-survival-guide
	Zero-Allocation Project Management Workbook	Developing a lean PM toolkit will free up PMs to focus on actually managing the project while still delivering accurate portfolio metrics. http://www.infotech.com/research/zero-allocation-project-management-workbook
	Zero-Allocation Project Manager Development Plan	A zero-allocation project management workshop/team building activity. http://www.infotech.com/research/zero-allocation-project-manager-development-plan
Blueprint: Manage an Agile Portfolio		
	Manage an Agile Portfolio	An Agile portfolio has a clear focus on current projects and allocations, with a great deal of value placed on near-term resource allocation. It carries key aspects of the Agile project paradigm to the level of governance and oversight. http://www.infotech.com/research/manage-an-agile-portfolio
	Storyboard: Manage an Agile Portfolio	An Agile portfolio has a clear focus on current projects and allocations, with a great deal of value placed on near-term resource allocation. It carries key aspects of the Agile project paradigm to the level of governance and oversight. http://www.infotech.com/research/storyboard-manage-an-agile-portfolio
	Agile Portfolio Communications Template	Use Info-Tech's Agile Portfolio Communications Template to help you document definitions and any key pieces of information that will be standardized for the Agile portfolio. http://www.infotech.com/research/agile-portfolio-communications-template
	Agile Portfolio Requirements Workbook	The Agile Portfolio Requirements Workbook is designed to help you document and analyze current state as well as stakeholder expectations and needs. http://www.infotech.com/research/agile-portfolio-requirements-workbook
	Agile Portfolio Sprint Prioritization Tool	Use the Agile Portfolio Sprint Prioritization Tool as a template or model to develop and customize your Agile Portfolio Dashboard. http://www.infotech.com/research/agile-portfolio-sprint-prioritization-tool
	Agile Portfolio Stakeholder Survey Tool	Use this tool to gather and analyze input from stakeholders as you plan, develop, and manage an Agile portfolio. http://www.infotech.com/research/agile-portfolio-stakeholder-survey-tool
	Manifesto for an Agile Portfolio	Adopt or adapt Info-Tech's Manifesto for an Agile Portfolio to provide a guide as you move ahead with implementing and managing your own Agile portfolio. http://www.infotech.com/research/manifesto-for-an-agile-portfolio
Blueprint: Grow Your Own PPM Solution		
	Grow Your Own PPM Solution	This blueprint will help you develop an affordable, adoptable, and effective PPM solution using widely available tools, based on Info-Tech's ready-to-deploy templates. http://www.infotech.com/research/grow-your-own-ppm-solution
Vendor Landscape: Enterprise Project Portfolio Management		
	Vendor Landscape: Enterprise Project Portfolio Management	Project Portfolio Management vendors are now focusing on increasing end-user adoption and capturing all work, rather than just project-related tasks. http://www.infotech.com/research/vendor-landscape-enterprise-project-portfolio-management

Type	Document	Description
	Enterprise PPM Vendor Shortlist & Detailed Feature Analysis Tool	Info-Tech conducted its own market evaluation of leading enterprise PPM vendors. This tool allows enterprises to profile their PPM requirements and generate a shortlist of vendors. http://www.infotech.com/research/enterprise-ppm-vendor-shortlist-detailed-feature-analysis-tool
	Enterprise PPM RFP Template	Use this template to help create a Request for Proposal (RFP) that lists a Project Portfolio Management (PPM) platform's features according to enterprise requirements. http://www.infotech.com/research/enterprise-ppm-rfp-template
	Enterprise PPM Vendor Demo Script	Use this demonstration script to provide vendors with a consistent set of instructions, ensuring an objective comparison of PPM product features. http://www.infotech.com/research/enterprise-ppm-vendor-demo-script
Vendor Landscape: Mid-Market Project Portfolio Management		
	Vendor Landscape: Mid-Market Project Portfolio Management	Project Portfolio Management vendors are now focusing on increasing end-user adoption and capturing all work, rather than just project-related tasks. http://www.infotech.com/research/vendor-landscape-mid-market-project-portfolio-management
	Vendor Landscape Storyboard: Mid-Market Project Portfolio Management	Leading mid-market PPM solutions add business value at all levels of the organization by facilitating collaboration, supporting geographically dispersed teams, and providing real-time visibility into the work that is being completed across the organization. http://www.infotech.com/research/it-vendor-landscape-storyboard-mid-market-project-portfolio-management
	Mid-Market PPM Vendor Shortlist & Detailed Feature Analysis Tool	Business simply doesn't happen in a perfect, orderly, predictable way. Organizations need the right tools to manage the uncertainty. This tool allows enterprises to profile their PPM requirements and generate a shortlist of vendors. http://www.infotech.com/research/mid-market-ppm-vendor-shortlist-detailed-feature-analysis-tool
	Mid-Market PPM RFP Template	Use this template to help create a Request for Proposal (RFP) that lists a Project Portfolio Management (PPM) platform's features according to enterprise requirements. http://www.infotech.com/research/mid-market-ppm-rfp-template
	Mid-Market PPM Vendor Demo Script	Use this demonstration script to provide vendors with a consistent set of instructions, ensuring an objective comparison of product features. http://www.infotech.com/research/mid-market-ppm-vendor-demo-script

Project Management Office: Project Portfolio Management

Type	Document	Description
Blueprint: Develop a Project Portfolio Management Strategy in Two Days		
	Develop a Project Portfolio Management Strategy in Two Days	Project Portfolio Management practices create value if they maximize the throughput of high value IT projects at the lowest possible cost. They destroy value when they foster needlessly sophisticated and costly processes. http://www.infotech.com/research/develop-a-project-portfolio-management-strategy-in-two-days

Type	Document	Description
	Storyboard: Develop a Project Portfolio Management Strategy in Two Days	Project Portfolio Management practices create value if they maximize the throughput of high value IT projects at the lowest possible cost. They destroy value when they foster needlessly sophisticated and costly processes. http://www.infotech.com/research/storyboard-develop-a-project-portfolio-management-strategy-in-two-days
	PPM Strategy Development Tool	Alignment between goals, processes, and tools contribute fundamentally to portfolio success. http://www.infotech.com/research/it-ppm-strategy-development-tool
	Project Meeting Follow-up Template	The project team, project manager, and project sponsor must be on the same page at all times. Regular meetings and active communication are imperative, but without summaries in writing, many stakeholders may forget or miss key points. Use this template to consistently summarize meeting takeaways and track tasks on a weekly basis. http://www.infotech.com/research/project-meeting-follow-up-template
	PPM Strategy Development Tool	Alignment between goals, processes, and tools contribute fundamentally to portfolio success. http://www.infotech.com/research/it-ppm-strategy-development-tool
	Cost/Benefit Analysis Tool	An important tool in a feasibility study or project assessment report is a Cost/Benefit Analysis. Use this tool to help provide deeper insight to pros and cons of the project options under consideration. http://www.infotech.com/research/costbenefit-analysis-tool
	PPM Strategy Development Tool	Alignment between goals, processes, and tools contribute fundamentally to portfolio success. http://www.infotech.com/research/it-ppm-strategy-development-tool
Blueprint: Use Applications Metrics That Matter		
	Use Applications Metrics That Matter	Applications management is a delicate balance, and metrics help maintain that balance. It all begins with measuring quality and customer satisfaction. http://www.infotech.com/research/it-use-applications-metrics-that-matter
	Storyboard: Use Applications Metrics That Matter	Applications management is a delicate balance, and metrics help maintain that balance. It all begins with measuring quality and customer satisfaction. http://www.infotech.com/research/it-storyboard-use-applications-metrics-that-matter
	Selecting and Reporting IT Metrics Template	All of the work that goes into selecting, collecting, and calculating IT metrics should not go unnoticed. Once the metrics have been gathered, many IT professionals face the challenge of presenting this raw data in a digestible manner. Use this template to select, enter, and track IT's key metrics in a format that can be easily communicated to all levels of the business. http://www.infotech.com/research/selecting-and-reporting-it-metrics-template
	Application Status Rationalization Tool	This advanced tool provides a series of questions that will help you determine if an application is adequately serving current business needs and is still affordable to maintain. Clear recommendations are provided as to whether an assessed application should be maintained, phased out, or retired outright. http://www.infotech.com/research/application-status-rationalization-tool
	IT Time Tracking Tool	Use this tool to map employees to the roles they perform. Estimate the number of employees needed to meet present or future workloads and identify where the organization is experiencing a staffing shortfall. http://www.infotech.com/research/it-time-tracking-tool

Type	Document	Description
★	Project Prioritization: Adjust Prioritization List to Reflect IT Capacity	After the preliminary ranking of projects, actual resource availability needs to be taken into account. In this stage, IT capacity for completing projects will be measured against the projects that have already been identified as high priority. http://www.infotech.com/research/project-prioritization-adjust-prioritization-list-to-reflect-it-capacity
	Change Request Form	Changes are an inevitable part of project management. Highly detailed documentation limits the negative impact of unforeseen changes by outlining the smaller impacts on each process. This tool gives the project manager a good estimate of the risks, priorities, and time required to make the change. http://www.infotech.com/research/change-request-form
	Functional Specifications Template	This document captures the functional specifications of a proposed system or application. While the business requirements represent the high-level problems that are to be solved by the proposed project, how they are to be solved is documented in the functional specifications. http://www.infotech.com/research/functional-specifications-template
	Request for Change Form	The creation of a request for change (RFC) form for the enterprise can be a time consuming and daunting task. Save time by customizing this form to the context of your enterprise. http://www.infotech.com/research/request-for-change-form
	Change Management Policy	Effective change management has an important role in protecting the business operation of the enterprise. The path to successful IT change management begins with senior management support and a solid change management policy. Use this template to define a consistent approach to manage changes to the IT environment of your enterprise. http://www.infotech.com/research/change-management-policy
	Eight Steps of Managing Change	Managing change has become the "silver bullet" in successfully managing strategy, process, people, and culture in most modern enterprises. Use this tool to aid in the process of effectively managing change. http://www.infotech.com/research/eight-steps-of-managing-change
	Issue Details Worksheet	An issue document need not be complex to be effective, but it must contain the right components. Use the Info-Tech "Issue Details Worksheet" to capture the details of each project issue. http://www.infotech.com/research/issue-details-worksheet
	Criteria for a Requirements Management Tool	Download Info-Tech's template, "Criteria for a Requirements Management Tool" to obtain a better understanding of the enterprise's specific needs in supporting common requirements management activities. http://www.infotech.com/research/criteria-for-a-requirements-management-tool
	Status Report Template	Reporting on project status is essential for keeping stakeholders in the loop, identifying problems, and documenting changes to the plan. Use this editable template to help you quickly document project progress and eliminate surprises. http://www.infotech.com/research/status-report-template
	Project Sizing Analysis Grid	Use this downloadable tool to help you accurately assess project size and select an appropriate level of project management. http://www.infotech.com/research/project-sizing-analysis-grid
	Departmental Goals Template	Use this goal-setting template to help you allocate resources wisely and communicate IT's direction to the rest of the company. http://www.infotech.com/research/departmental-goals-template

Type	Document	Description
Additional Resources		
	Do you have an overview of the requirements management market?	Requirements Management Solutions are essentially a very focused subsection of the more complete ALM suite of tools. A truly comprehensive approach to traceability would archive, index, and link everything. http://www.infotech.com/research/do-you-have-an-overview-of-the-requirements-management-market
	Go Green to Save Green	Be kind to the environment and your company's bank account. Learn ways to save while going green. http://www.infotech.com/research/go-green-to-save-green
	PM, PPM, EPM: Alike but Not the Same	Many IT and business leaders have difficulty correctly defining the scope of Project Management. Others confuse Enterprise Portfolio Management and Project Portfolio Management with one another, and with good reason: even vendors blur the lines between them. Differentiate between the three before seeking helpful tools to avoid lost time, money, and effort. http://www.infotech.com/research/pm-ppm-epm-alike-but-not-the-same
	Planning the Project for a Master Data Governance Program	Data governance is a vital component of any master data management strategy. The creation of a governance program depends upon executive sponsorship and gaining the support of key stakeholders. Develop a clear project strategy from the outset to avoid political fallout. http://www.infotech.com/research/planning-the-project-for-a-master-data-governance-program
	Making Cross-Functional Teams Work: A Case Study	Enterprises continue to face the challenge of rapidly deploying high-performance applications across network infrastructures. Cross-functional teams can improve the performance of business applications and a network's service level capabilities. This case study reviews how Company Z made a cross-functional team a success. http://www.infotech.com/research/making-cross-functional-teams-work-a-case-study
	Moodle: The Open Source Course Management System	Moodle, the oddly named Course Management System (CMS), is steadily gaining prominence as a leading courseware platform while also proving the mettle of the open source model. Academic institutions and other organizations exploring e-learning should understand potential advantages and challenges associated with this platform. http://www.infotech.com/research/moodle-the-open-source-course-management-system
	A Policy for IT Standards	A decision to bring a technology into the enterprise should be guided by a documented standard of what is and isn't used. Use this template to help draft an enterprise-wide Information Technology Standards and Guidelines policy. http://www.infotech.com/research/a-policy-for-it-standards

Systems Integration Research

Systems Integration: Analytics, BI & Reporting

Type	Document	Description
Blueprint: Assess and Optimize BI Operations		
	Assess and Optimize BI Operations	This blueprint will help the Head of BI improve BI speed, quality, and cost by assessing and optimizing the BI operation. http://www.infotech.com/research/assess-and-optimize-bi-operations
	Storyboard: Assess and Optimize BI Operations	This do-it-yourself guide will help the Head of BI (i.e. BI Manager or Director of BI) improve BI speed, quality, and cost by assessing and optimizing the BI operation. http://www.infotech.com/research/storyboard-assess-and-optimize-bi-operations
	BI Operation Assessment and Planning Tool	Use this tool to assess the current BI operating model, plan the target model, and identify and plan BI operation improvement. http://www.infotech.com/research/bi-operation-assessment-and-planning-tool
	BI Operation Performance and Value Measurement Plan	BI performance measures are quantified facts about the execution of the BI operation, reflecting the degree of adherence to BI standard operating procedure. http://www.infotech.com/research/bi-operation-performance-and-value-measurement-plan
	BI Operation Improvement Plan Tool	Use this template to capture, categorize, assign, analyze benefits and costs of, and schedule improvement initiatives identified in the BI operation optimization project. http://www.infotech.com/research/bi-operation-improvement-plan-tool
	BI Staff Competency Management Tool	Tailor Info-Tech's Business Intelligence Staff Competency Management Tool to reflect your organization-specific position titles, required skills for each role, required proficiency level for each skill across roles, and BI staff assignment (names of employees for each position). http://www.infotech.com/research/bi-staff-competency-management-tool
	BI Application Function Management Tool	This tool assists in documenting, rationalizing, and organizing application functions on the BI platform. For already enabled application functions. The tool documents key information such as current use cases, accountable person, associated configuration changes, documentation references and training requirements. http://www.infotech.com/research/bi-application-function-management-tool
	BI Operation Improvement Tracker	This tool assists in organizing and tracking the implementation and ongoing progress of BI improvement initiatives. http://www.infotech.com/research/bi-operation-improvement-tracker
	BI Operations Communication Plan Tool	This document provides a template for structuring and managing ongoing communications among key BI stakeholders. http://www.infotech.com/research/bi-operations-communication-plan-tool
	BI Operations Optimization Project Charter Template	The objective of the BI operations optimization project is to design a target BI operating model and define a BI operations improvement plan and roadmap that outlines and schedules steps required to implement the BI operating model and achieve the required BI operations performance level. http://www.infotech.com/research/bi-operations-optimization-project-charter-template

Type	Document	Description
	BI Center of Excellence Charter Template	Adopt or adapt responsibilities of a Business Intelligence Center of Excellence (BICoE). http://www.infotech.com/research/bi-center-of-excellence-charter-template
	BI Standard Operating Procedure Template	Process documentation provides guidance and step-by-step instructions for employees on how to execute the process. http://www.infotech.com/research/bi-standard-operating-procedure-template
Blueprint: Decide Whether Microsoft Business Intelligence 2012 Fits the Bill		
	Decide Whether Microsoft Business Intelligence 2012 Fits the Bill	Many organizations are already leveraging Microsoft Excel as an analytics tool, but have no solution for storing and sharing data and reports among the company. Microsoft's Business Intelligence solution aims at solving this problem. http://www.infotech.com/research/it-decide-whether-microsoft-business-intelligence-2012-fits-the-bill
	Storyboard: Decide Whether Microsoft Business Intelligence 2012 Fits the Bill	Many organizations are already leveraging Microsoft Excel as an analytics tool, but have no solution for storing and sharing data and reports among the company. Microsoft's Business Intelligence solution aims at solving this problem. http://www.infotech.com/research/it-storyboard-decide-whether-microsoft-business-intelligence-2012-fits-the-bill
	Microsoft BI Appropriateness Assessment Tool	The Microsoft Business Intelligence Appropriateness Assessment tool facilitates the decision-making process of implementing Microsoft BI. http://www.infotech.com/research/microsoft-bi-appropriateness-assessment-tool
	Microsoft Business Intelligence Cost Calculation Tool	The Microsoft Business Intelligence Cost Calculation tool facilitates the decision-making process of implementing Microsoft BI. By providing the additional cost of licensing the Microsoft BI stack, the cost calculation tool provides an estimated total spend to implement missing infrastructure. http://www.infotech.com/research/it-microsoft-business-intelligence-cost-calculation-tool
	Business Intelligence RFP Template	Use Info-Tech's RFP template to guide vendors through the procurement process. http://www.infotech.com/research/business-intelligence-rfp-template
	Business Intelligence Vendor Demo Script	Use the Business Intelligence Vendor Demo Script to guide vendor demonstrations of their BI platforms. http://www.infotech.com/research/business-intelligence-vendor-demo-script
Blueprint: Develop a Business Intelligence Tool Strategy		
	Develop a Business Intelligence Tool Strategy	Involve the business in developing the organization's BI tool strategy to get funding and approval and improve the adoption and satisfaction of BI tools. http://www.infotech.com/research/develop-a-business-intelligence-tool-strategy
	Storyboard: Develop a Business Intelligence Tool Strategy	Improve business decision making and minimize cost by selecting only the most important BI capabilities. http://www.infotech.com/research/storyboard-develop-a-business-intelligence-tool-strategy
	BI Issue Assessment Tool	Use Info-Tech's Business Intelligence Issue Assessment Tool to determine the appropriate approach in addressing BI issues. http://www.infotech.com/research/bi-issue-assessment-tool

Type	Document	Description
	BI Tool Strategy Assessment and Planning Tool	The BI Tool Strategy Assessment and Planning Tool is used to plan the target state BI architecture and to assess current state BI capabilities. The outputs of this tool are to be used as inputs into the BI Tool Strategy Document. http://www.infotech.com/research/bi-tool-strategy-assessment-and-planning-tool
	BI Tool Strategy Measurement Plan	BI performance measures are quantified facts about the execution of the BI operation, which is influenced by the efficiency and effectiveness of BI tools. http://www.infotech.com/research/bi-tool-strategy-measurement-plan
	Application Inventory and Quality Assessment Tool	Assess application functional and technical quality of each BI tool in the current state. http://www.infotech.com/research/application-inventory-and-quality-assessment-tool
	IT Risk Profile Tool	Use the IT Risk Profile Tool to continuously document, track, and report risk events as part of your risk management strategy. Use risk dashboards and reporting as part of your ongoing communication plan with business leaders. http://www.infotech.com/research/it-risk-profile-tool
	BI Tool Strategy Improvement Tracker	This tool assists in organizing and tracking the implementation and ongoing progress of improvement initiatives chosen to address the selected gaps. By using the initiative tracking section, improvement initiatives can be planned out and displayed graphically in a chronological manner. http://www.infotech.com/research/bi-tool-strategy-improvement-tracker
	BI Tool Strategy Communication Plan Template	Create a communication plan to manage ongoing communication among BI stakeholders. http://www.infotech.com/research/bi-tool-strategy-communication-plan-template
	BI Tool Strategy Project Charter Template	Use Info-Tech's BI Tool Strategy Charter Template to authorize this project. http://www.infotech.com/research/bi-tool-strategy-project-charter-template
	BI Tool Strategy Project Charter Presentation Template	Create a presentation to showcase the BI tool strategy project charter. http://www.infotech.com/research/bi-tool-strategy-project-charter-presentation-template
	BI Tool Strategy Template	Create a BI tool strategy document to facilitate stakeholder agreement on scope and direction of BI tools. http://www.infotech.com/research/bi-tool-strategy-template
	BI Tool Strategy Improvement Plan Template	Define the improvement initiatives that will address the selected gaps to achieve the target state. http://www.infotech.com/research/bi-tool-strategy-improvement-plan-template
	BI Tool Strategy Document and Roadmap Presentation Template	Create a final presentation to summarize the BI tool strategy document and roadmap. http://www.infotech.com/research/bi-tool-strategy-document-and-roadmap-presentation-template
Blueprint: Develop a Winning BI Strategy		
	Develop a Winning BI Strategy	A significant number of organizations ranked business intelligence (BI) as IT's top priority for 2014; however, just because there is an appetite for BI does not mean the initiative will be an automatic success. In fact less than 50% of organizations considered their BI initiatives to be a complete success. It is imperative that organizations take the time to craft a BI strategy that aligns with business goals and fosters end-user adoption. http://www.infotech.com/research/develop-a-winning-bi-strategy

Type	Document	Description
	Storyboard: Develop a Winning BI Strategy	Create transformational gains with a business intelligence strategy and start making the right decisions quicker and more cost effectively. http://www.infotech.com/research/storyboard-develop-a-winning-bi-strategy
	BI Pilot Project Planning Tool	The BI Pilot Project Planning Tool helps organizations initiate, manage, and execute the BI pilot project. http://www.infotech.com/research/bi-pilot-project-planning-tool
	BI Strategy Measurement Plan	IT can't take credit for things it does not measure. Use the BI Strategy Measurement Plan to quantify and share the success of the BI program. http://www.infotech.com/research/bi-strategy-measurement-plan
	BI Planning Tool	The BI Planning Tool helps organizations aggregate the BI needs of the organization and prioritize the solution design. This tool also allows users to document the solution requirements and budget. http://www.infotech.com/research/bi-planning-tool
	BI Strategy Project Tracking Tool	Keep track of the progress of the enterprise-wide deployment of BI using the BI Strategy Project Tracking Tool. This tool enables organizations to monitor timelines, issue resolution, and completed tasks. http://www.infotech.com/research/bi-strategy-project-tracking-tool
	BI Business Case Presentation	Generating buy-in for BI with senior executives is imperative for launching this initiative. Use this business case presentation to showcase the benefits of BI and address any concerns stakeholders may have. http://www.infotech.com/research/bi-business-case-presentation
	BI Project Charter Template	Ensure the BI project receives the appropriate resources, funding, and approval by using the BI Project Charter Template. http://www.infotech.com/research/bi-project-charter-template
	BI Strategy Roadmap Template	Using the BI Strategy Roadmap Template will ensure the BI pilot project and eventual enterprise-wide deployment is aligned with the organization's goals and strategy. http://www.infotech.com/research/bi-strategy-roadmap-template
	BI Communication Planning Template	Building awareness and support for BI across the organization will take a coordinated communication effort. Use the BI Communication Planning Template to document and prepare for all major stakeholder interactions. http://www.infotech.com/research/bi-communication-planning-template
Blueprint: Formulate a Social Analytics Strategy		
	Storyboard: Formulate a Social Analytics Strategy	Organizations are feeling increasing pressure to build a presence in the social media space. However, social media projects should all be paired with some level of social analytics. Develop a clear idea of what you are trying to achieve and the resources available to you before diving in. http://www.infotech.com/research/it-storyboard-formulate-a-social-analytics-strategy
Vendor Landscape: Enterprise BI		
	Vendor Landscape: Enterprise BI	When large enterprises need to select a BI vendor, the task can be challenging. Full stack BI offerings have very little variability in functionality. Understanding which advanced features your organization can use to increase data insight will help in the selection process. http://www.infotech.com/research/it-vendor-landscape-plus-enterprise-bi-suites

Type	Document	Description
	Vendor Landscape Storyboard: Enterprise BI	When large enterprises need to select a BI vendor, the task can be challenging. Full stack BI offerings have very little variability in functionality. Understanding which advanced features your organization can use to increase data insight will help in the selection process. http://www.infotech.com/research/it-vendor-landscape-storyboard-enterprise-bi
	Enterprise BI Vendor Shortlist & Detailed Feature Analysis Tool	Before selecting a Business Intelligence (BI) vendor, determine a shortlist by using the Enterprise BI Vendor Shortlist & Detailed Feature Analysis Tool. http://www.infotech.com/research/enterprise-bi-vendor-shortlist-detailed-feature-analysis-tool
	Business Intelligence RFP Template	Use Info-Tech's RFP template to guide vendors through the procurement process. http://www.infotech.com/research/business-intelligence-rfp-template
	Business Intelligence Vendor Demo Script	Use the Business Intelligence Vendor Demo Script to guide vendor demonstrations of their BI platforms. http://www.infotech.com/research/business-intelligence-vendor-demo-script
Vendor Landscape: Mid-Market BI		
	Vendor Landscape: Mid-Market BI	BI vendors are making their solutions more accessible for the mid-market and non-technologists through flexible deployment options and intuitive interfaces. http://www.infotech.com/research/vendor-landscape-mid-market-bi-suites
	Vendor Landscape Storyboard: Mid-Market BI	The Business Intelligence (BI) market is a rapidly evolving space where features that were differentiators only a few years ago are now table stakes. Small and mid-sized enterprises should evaluate their needs and find the best fit based on the criteria that are most applicable to their situation. http://www.infotech.com/research/it-vendor-landscape-storyboard-mid-market-bi
	Mid-Market BI Vendor Shortlist and Feature Analysis Tool	Info-Tech conducted its own market evaluation of 11 leading Mid-Market BI vendors. This tool allows enterprises to profile their BI requirements and generate a shortlist of vendors. http://www.infotech.com/research/mid-market-bi-vendor-shortlist-and-feature-analysis-tool
	Business Intelligence RFP Template	Use Info-Tech's RFP template to guide vendors through the procurement process. http://www.infotech.com/research/business-intelligence-rfp-template
	Business Intelligence Vendor Demo Script	Use the Business Intelligence Vendor Demo Script to guide vendor demonstrations of their BI platforms. http://www.infotech.com/research/business-intelligence-vendor-demo-script
Additional Resources		
	Enterprise BI RFP Scoring Tool	For organizations that have issued a formal Request for Proposal (RFP) using Info-Tech's BI RFP Template, gathering and scoring the various responses can be difficult and time consuming. This tool enables enterprises to evaluate and compare the results of a BI RFP process quickly and easily. http://www.infotech.com/research/it-enterprise-bi-rfp-scoring-tool
	Business Intelligence: Core Concepts and Technologies	Enterprises generate a great deal of useless data in the name of Business Intelligence (BI). Business and IT decision makers need to establish the strategic intent behind BI before even considering tool adoption. http://www.infotech.com/research/business-intelligence-core-concepts-and-technologies

Systems Integration: Data Integration & Data Management

Type	Document	Description
	Data Provenance Policy	The value of data as an institutional resource is increased through its widespread and appropriate use; its value is diminished through improper sourcing, misuse, misinterpretation, unnecessary restrictions to its access, or failure to maintain quality. http://www.infotech.com/research/it-data-provenance-policy
	User Authorization, Identification, & Authentication Policy	The use of authorization, identification, and authentication controls ensures that only known users make use of information systems. Without these controls, the potential exists that systems could be accessed illicitly and that the security of those systems could be compromised. http://www.infotech.com/research/it-user-authorization-identification-authentication-policy
	Data Provenance Policy	The value of data as an institutional resource is increased through its widespread and appropriate use; its value is diminished through improper sourcing, misuse, misinterpretation, unnecessary restrictions to its access, or failure to maintain quality. http://www.infotech.com/research/it-data-provenance-policy

Systems Integration: Enterprise Integration

Type	Document	Description
Blueprint: Build an Application Integration Strategy		
	Build an Application Integration Strategy	Create a formal application integration (AI) strategy blueprint to improve success of IT projects and assert some control over today's major IT disruptors. http://www.infotech.com/research/build-an-application-integration-strategy
	Storyboard: Build an Application Integration Strategy	Create a formal application integration (AI) strategy blueprint to improve success of IT projects and assert some control over today's major IT disruptors. http://www.infotech.com/research/storyboard-build-an-application-integration-strategy
	Application Integration Appropriateness Assessment Tool	Application integration (AI) tools help organizations transition away from the traditional point-to-point, hand-coding practices that were once standard in AI strategies. However, some organizations are more capable at leveraging the benefits from AI tools than others. http://www.infotech.com/research/application-integration-appropriateness-assessment-tool
	Application Integration Readiness Assessment Tool	Application integration (AI) is an invaluable approach for enhancing application communication and simplifying the business and technical environments, but some organizations are in a better position to fully leverage AI initiatives than others. http://www.infotech.com/research/it-application-integration-readiness-assessment-tool
	Application Integration Architect	The Application Integration (AI) Architect's role is to plan, coordinate, architect, and supervise all activities related to the integration of software programs, applications, and third-party solutions as required to meet the business requirements of the organization. http://www.infotech.com/research/it-application-integration-architect

Type	Document	Description
	Application Integration Specialist	The Application Integration (AI) specialist must successfully organize and supervise all AI initiatives. The individual is responsible for managing the business and IT service components in the AI environment. http://www.infotech.com/research/application-integration-specialist
	Application Integration Strategy Template	This template is an essential document for pulling together all of the work, planning, and investments completed through identifying your current environment, developing the future vision, performing a gap analysis, and building your roadmap. http://www.infotech.com/research/it-application-integration-blueprint-template
	Integration Service Catalog Template	Keeping inventory of your services and interfaces is a necessary component of proper Application Integration. This is a customizable template that allows you to easily catalog your services and interfaces. http://www.infotech.com/research/it-integration-service-catalog-template
	Data Scientist	The Data Scientist's role is to harness vast amounts of data to optimize business results. He/she will exercise their knowledge of descriptive and multivariate statistical techniques and applications, database analysis tools and techniques to develop strategic insights to drive business goals. http://www.infotech.com/research/it-data-scientist
	Data Steward	Data stewards are designated employees with a mandate and accountability for improving the data quality and integrity in their particular business area or data silo. They devise and implement processes and policies to uphold data quality and standardize data management processes. http://www.infotech.com/research/data-steward
	Password Policy Template	Passwords are the primary form of user authentication used to grant access to information systems. To ensure that passwords provide as much security as possible they must be carefully created and used. http://www.infotech.com/research/password-policy-template
Blueprint: Develop a Comprehensive Business-to-Business Integration Strategy		
	Develop a Comprehensive Business-to-Business Integration Strategy	As the business recognizes the importance of B2B integration, they place increasing pressure on IT to accommodate the onboarding of additional trading partners and data exchanges. A comprehensive B2B strategy and roadmap will assist IT in enhancing their current integration capabilities to efficiently meet the needs of the business and take advantage of future trends. http://www.infotech.com/research/develop-a-comprehensive-business-to-business-integration-strategy
	Storyboard: Develop a Comprehensive Business-to-Business Integration Strategy	As the business recognizes the importance of B2B integration, they place increasing pressure on IT to accommodate the onboarding of additional trading partners and data exchanges. IT must enhance their current integration capabilities to efficiently meet the needs of the business and take advantage of future trends. http://www.infotech.com/research/storyboard-develop-a-comprehensive-business-to-business-integration-strategy
	B2B Integration Trading Partner Inventory Tool	The purpose of this tool is to assist you in formally documenting your trading partner requirements. By having a better understanding of the standards, protocols, and data types your trading partners use, you can identify immediate and future opportunities for integration. The tool has been designed to collect information regarding your top ten trading partners. http://www.infotech.com/research/b2b-integration-trading-partner-inventory-tool

Type	Document	Description
	B2B Integration Maturity Assessment Tool	This tool will help you assess your current capabilities in terms of technology, process, data, and people. After this assessment, you will fall into one of the four maturity states: initial, standardized, measurable, or optimized. http://www.infotech.com/research/b2b-integration-maturity-assessment-tool
	B2B Integration TCO Calculator	This tool is designed to aid your organization in selecting the most appropriate B2B solution through assessing the total cost of ownership for a five-year plan. This tool will help you understand the costs associated with an in-source, outsourced, and hybrid solution. http://www.infotech.com/research/b2b-integration-tco-calculator
	B2B Integration Project Charter Template	This template will help to effectively and efficiently communicate key information to stakeholders and participants regarding project goals, objectives, roles, and responsibilities. By successfully conveying the right information regarding the B2B integration strategy, you will receive stakeholder buy-in and approval to proceed with the development of the strategy. http://www.infotech.com/research/b2b-integration-project-charter-template
	B2B Integration Stakeholder Interview Guide	This stakeholder interview guide will help IT set up structured interviews with key stakeholders and extract the right information to formulate a B2B integration strategy. http://www.infotech.com/research/b2b-integration-stakeholder-interview-guide
	B2B Integration Trading Partner Survey	The trading partner survey guide will assist your organization in gathering the right requirements for the successful formulation of a B2B integration strategy. http://www.infotech.com/research/b2b-integration-trading-partner-survey
	B2B Integration Strategy and Roadmap Template	This template will help your organization build a B2B strategic roadmap by recording your solution decisions, documenting the solution approach, and providing a baseline for implementation decisions. http://www.infotech.com/research/b2b-integration-strategy-and-roadmap-template
	Make the Business Case for B2B Integration Presentation	This editable PowerPoint presentation will help you gather the right information to present to stakeholders and gain approval to move forward with implementing the strategy. http://www.infotech.com/research/make-the-business-case-for-b2b-integration-presentation
	B2B Integration Communication Planning Template	This tool is designed to help track and define the communication methods needed to introduce initiatives and change. http://www.infotech.com/research/b2b-integration-communication-planning-template
Blueprint: Develop a Five Year Data Architecture Plan		
	Develop a Five Year Data Architecture Plan	Cloud and mobile computing are changing where and how data is stored and accessed. Big Data and Analytics are upon us. Architect for change to reduce chaos and plan for each disruptor's impact on your environment now and into the future. http://www.infotech.com/research/it-develop-a-5-year-data-architecture-plan
	Storyboard: Develop a Five Year Data Architecture Plan	Big Data and Analytics are upon us. Architect for change to reduce chaos and plan for each disruptor's impact on your environment now and into the future. http://www.infotech.com/research/it-storyboard-develop-a-five-year-data-architecture-plan

Type	Document	Description
	Data Scientist	The Data Scientist's role is to harness vast amounts of data to optimize business results. He/she will exercise their knowledge of descriptive and multivariate statistical techniques and applications, database analysis tools and techniques to develop strategic insights to drive business goals. http://www.infotech.com/research/it-data-scientist
	Data Architecture Plan Program Charter Template	A program charter serves several important functions. It organizes the program initiatives so that you can make efficient and effective resource allocation decisions. It also communicates important details on the program's purpose, scope definition, and parameters. http://www.infotech.com/research/it-data-architecture-plan-program-charter-template
	Data Integration and Virtualization Policy	The purpose of this policy is to ensure that organizations mitigate risks to personal privacy when integrating, replicating, or virtualizing personal data, and only integrates, replicates, or virtualizes data when necessary. http://www.infotech.com/research/it-data-integration-and-virtualization-policy
	Data Architecture Plan	This template is an essential document for pulling together all of the work, planning, and investments made in building your five year data architecture plan. http://www.infotech.com/research/it-data-architecture-plan
	Data Change Communication Plan Template	By planning for, and efficiently communicating any changes to data processes, policies, or management that a data audit may bring, many initial issues and concerns end users may have can be put to rest from the outset. http://www.infotech.com/research/it-data-change-communication-plan-template
Blueprint: Develop a Master Data Management Strategy and Roadmap		
	Develop a Master Data Management Strategy and Roadmap	A Master Data Management strategy will help organizations of all sizes find a central, single version of the truth, making accurate and complete data available to the applications, people, and processes that need it. http://www.infotech.com/research/develop-a-master-data-management-strategy-and-roadmap
	Storyboard: Develop a Master Data Management Strategy and Roadmap	By setting a Master Data Management (MDM) strategy, organizations of all sizes can find a central, single version of the truth, making accurate and complete data available to the applications, people, and processes that need it. http://www.infotech.com/research/storyboard-develop-a-master-data-management-strategy-and-roadmap
	Master Data Management Readiness Assessment	Use this tool in conjunction with the Develop a Master Data Management Strategy and Roadmap blueprint. This tool will assist you in determining your readiness for MDM in terms of people, process, technology, and data. http://www.infotech.com/research/master-data-management-readiness-assessment
	Master Data Management Business Needs Assessment	Use this tool in conjunction with the Develop a Master Data Management Strategy and Roadmap blueprint. This tool will assist you in determining the master data domains present in your organization and the suggestion capabilities for your MDM solution. http://www.infotech.com/research/master-data-management-business-needs-assessment

Type	Document	Description
	Data Steward	Data stewards are designated employees with a mandate and accountability for improving the data quality and integrity in their particular business area or data silo. They devise and implement processes and policies to uphold data quality and standardize data management processes. http://www.infotech.com/research/data-steward
	Master Data Management Strategic Roadmap Template	This template will help build a living MDM strategic roadmap for the enterprise. http://www.infotech.com/research/master-data-management-strategic-roadmap-template
	Master Data Management Architecture Guiding Principles	Guiding principles define the underlying general rules and guidelines (across the architecture environment) that an organization will use to utilize and deploy all business and IT resources and assets. http://www.infotech.com/research/master-data-management-architecture-guiding-principles
	Master Data Management Solution RFP Template	Organizations embarking on the selection process for a master data management solution vendor may elect to issue a Request for Proposal (RFP) after determining their final selection criteria. http://www.infotech.com/research/master-data-management-solution-rfp-template
	Master Data Management Change Request Form	A Master Data Management Change Request is a formal document that will both outline the requested change and outline any possible implications associated with it. http://www.infotech.com/research/master-data-management-change-request-form
	Data Scientist	The Data Scientist's role is to harness vast amounts of data to optimize business results. He/she will exercise their knowledge of descriptive and multivariate statistical techniques and applications, database analysis tools and techniques to develop strategic insights to drive business goals. http://www.infotech.com/research/it-data-scientist
	Application Integration Appropriateness Assessment Tool	Application integration (AI) tools help organizations transition away from the traditional point-to-point, hand-coding practices that were once standard in AI strategies. However, some organizations are more capable at leveraging the benefits from AI tools than others. http://www.infotech.com/research/application-integration-appropriateness-assessment-tool
	Application Integration Readiness Assessment Tool	Application integration (AI) is an invaluable approach for enhancing application communication and simplifying the business and technical environments, but some organizations are in a better position to fully leverage AI initiatives than others. http://www.infotech.com/research/it-application-integration-readiness-assessment-tool
	Application Integration Architect	The Application Integration (AI) Architect's role is to plan, coordinate, architect, and supervise all activities related to the integration of software programs, applications, and third-party solutions as required to meet the business requirements of the organization. http://www.infotech.com/research/it-application-integration-architect
	Application Integration Specialist	The Application Integration (AI) specialist must successfully organize and supervise all AI initiatives. The individual is responsible for managing the business and IT service components in the AI environment. http://www.infotech.com/research/application-integration-specialist

Type	Document	Description
	Application Integration Strategy Template	This template is an essential document for pulling together all of the work, planning, and investments completed through identifying your current environment, developing the future vision, performing a gap analysis, and building your roadmap. http://www.infotech.com/research/it-application-integration-blueprint-template
	Integration Service Catalog Template	Keeping inventory of your services and interfaces is a necessary component of proper Application Integration. This is a customizable template that allows you to easily catalog your services and interfaces. http://www.infotech.com/research/it-integration-service-catalog-template
Blueprint: Gain Control of Cloud Integration Strategies Before they Float Away		
	Gain Control of Cloud Integration Strategies Before they Float Away	Organizations are moving headlong into Cloud computing without properly assessing the impact it will have and the level of commitment required for integration. This solution set will help you frame the issues of Cloud integration from higher level application integration to lower level data integration without neglecting cross cutting issues around identity management and server level management. http://www.infotech.com/research/it-gain-control-of-cloud-integration-strategies-before-they-float-away
	Storyboard: Gain Control of Cloud Integration Strategies Before they Float Away	Organizations of all sizes look to leverage agility, low capital, and cost barriers to entry with the hot trend of cloud computing. http://www.infotech.com/research/it-storyboard-gain-control-of-cloud-integration-strategies-before-they-float-away
	Cloud Integration Checklist	This Cloud Integration Checklist provides a guideline for assessing Cloud integration concerns across four critical areas within an organization. http://www.infotech.com/research/it-cloud-integration-checklist
	Gain Control of Cloud Integration Strategies	The Cloud offers significant benefits to the organization, but increased integration challenges will occur if an adequate strategy isn't in place. Integration, and all the processes surrounding it, must be thought about proactively before migration to the Cloud, not afterwards. http://www.infotech.com/research/it-gain-control-of-cloud-integration-strategies
Blueprint: Implement a Data Integration Strategy in the Cloud		
	Data Integration Mapping Template	Use this customizable template to map the data flows that will be occurring between databases, applications, and cloud services. http://www.infotech.com/research/it-data-integration-mapping-template
	Cloud Data Integration Appropriateness Assessment Tool	This tool will help you determine whether or not data integration (DI) is required at your organization, the type of tool needed to support your DI needs, as well as the suitability of deployment methods based on your organization's personnel, processes, and technological factors. http://www.infotech.com/research/it-cloud-data-integration-appropriateness-assessment-tool
	Data Integration Specialist	The Data Integration (DI) Specialist must successfully organize and supervise all DI initiatives. The individual is responsible for managing the flow of data between databases, apps, and Cloud services. http://www.infotech.com/research/it-data-integration-specialist

Type	Document	Description
	Data Steward	Data stewards are designated employees with a mandate and accountability for improving the data quality and integrity in their particular business area or data silo. They devise and implement processes and policies to uphold data quality and standardize data management processes. http://www.infotech.com/research/data-steward
	Master Data Record Tool	Leverage the Master Data Record Tool to catalogue systems within the organization to help you determine with which data set you should begin your MDM initiative. http://www.infotech.com/research/it-master-data-record-tool
	Data Steward	Data stewards are designated employees with a mandate and accountability for improving the data quality and integrity in their particular business area or data silo. They devise and implement processes and policies to uphold data quality and standardize data management processes. http://www.infotech.com/research/data-steward
	Data Governance Steering Committee Charter Template	A data governance steering committee is an excellent tool for making both IT and the business accountable for data governance decisions within the organization. http://www.infotech.com/research/it-mdm-data-governance-steering-committee-charter-template
Blueprint: Implement an Enterprise Service Bus (ESB)		
	Implement an Enterprise Service Bus (ESB)	An ESB is an important part of an organization's architecture. Implementing ESB in an ad hoc manner can introduce challenges related to architecture, configuration, monitoring, and platform. Architecting the ESB environment will reduce headaches down the road. http://www.infotech.com/research/implement-an-enterprise-service-bus-esb--3
	Storyboard: Implement an Enterprise Service Bus	An ESB is an important part of an organization's architecture. Implementing ESB in an ad hoc manner can introduce challenges related to architecture, configuration, monitoring, and platform. Architecting the ESB environment will reduce headaches in the future. http://www.infotech.com/research/storyboard-implement-an-enterprise-service-bus
	Data Integration Mapping Tool	If your integration tool does not have a catalog or metadata repository to store all mappings used across the organization, this tool can be used to document the mappings and allow them to be stored in a content and/or knowledge management system. http://www.infotech.com/research/data-integration-mapping-tool
	Enterprise Service Bus RFP Scoring Tool	Use this request for proposal scoring tool to evaluate enterprise service bus (ESB) vendor's ability to meet your requirements and pricing guidelines. http://www.infotech.com/research/enterprise-service-bus-rfp-scoring-tool
	Enterprise Service Bus Readiness Assessment Tool	Use this tool in conjunction with the Implement an Enterprise Service Bus blueprint. This tool will assist you in determining your organization’s readiness for an ESB implementation. http://www.infotech.com/research/enterprise-service-bus-readiness-assessment-tool

Type	Document	Description
	Enterprise Service Bus Project Appropriateness Assessment	Use the Enterprise Service Bus Project Appropriateness Assessment to identify projects that are suitable to be coupled with an ESB implementation. ESBs are rarely implemented on their own, so carrying an ESB implementation on another project is a common approach. http://www.infotech.com/research/enterprise-service-bus-project-appropriateness-assessment
	Enterprise Service Bus Service Mapping Catalog	Use the Enterprise Service Bus (ESB) Service Mapping Catalog to maintain an inventory of all services and interfaces deployed in an integration or SOA environment. This catalog should be maintained by the authority responsible for integration services in the organization. http://www.infotech.com/research/enterprise-service-bus-service-mapping-catalog
	Enterprise Service Bus Data Integration Mapping Tool	If your integration tool does not have a catalog or metadata repository to store all mappings used across the organization, this tool can be used to document the mappings and allow them to be stored in a content and/or knowledge management system. http://www.infotech.com/research/enterprise-service-bus-data-integration-mapping-tool
	Enterprise Service Bus Service Interface Contract Template	A service interface contract is a record of a service's functions, parameters, data schema, protocols and security controls. The Enterprise Service Bus (ESB) Service Interface Contract Template documents service ownership and version and defines the context in which it should be used. http://www.infotech.com/research/enterprise-service-bus-service-interface-contract-template
	Enterprise Service Bus Principles and Guidelines	Guiding principles define the underlying general rules that an organization will use to utilize and deploy all business and IT resources and assets relative to an Enterprise Service Bus (ESB). This template provides best practice principles and guidelines for ESB implementation. http://www.infotech.com/research/enterprise-service-bus-principles-and-guidelines
	Enterprise Service Bus Architecture Decisions Template	The ESB Architecture Decisions Template is a formal document that will outline decisions you make while designing your ESB solution. http://www.infotech.com/research/enterprise-service-bus-architecture-decisions-template
	Enterprise Service Bus RFP	Use this request for proposal (RFP) template to create a formal invitation for enterprise service bus (ESB) vendors to submit a proposal meeting your ESB requirements. http://www.infotech.com/research/enterprise-service-bus-rfp
	Enterprise Service Bus Work Breakdown Structure	Use the Enterprise Service Bus Work Breakdown Structure (ESB WBS) as a reference for creating and managing your ESB implementation. The ESB WBS provides a comprehensive breakdown of tasks that must be completed during an ESB implementation. http://www.infotech.com/research/enterprise-service-bus-work-breakdown-structure
	Enterprise Service Bus Test Plan Template	The test plan is a description of testing objectives, activities, and desired results across the system implementation environment. Use the Enterprise Service Bus Test Plan to create the test strategy early in the implementation project to properly set expectations and help ensure an implementation with fewer defects. http://www.infotech.com/research/enterprise-service-bus-test-plan-template

Type	Document	Description
	Enterprise Service Bus Disaster Recovery Checklist	This template serves as an example of an ESB disaster recovery checklist. Using a checklist, rather than a detailed procedure, is ideal for situations where staff need a reminder of what needs to be completed, not how to complete it. http://www.infotech.com/research/enterprise-service-bus-disaster-recovery-checklist
	Enterprise Service Bus Implementation Plan Template	The ESB Implementation Plan is a formal document that will organize the ESB project, govern the allocation of resources, and communicate information around the project purpose, scope, and parameters. http://www.infotech.com/research/enterprise-service-bus-implementation-plan-template
	Enterprise Service Bus Center of Excellence Charter Template	The ESB Center of Excellence (CoE) Charter is a formal document that will help ensure ESB initiatives are approached, managed, and governed in a successful manner. http://www.infotech.com/research/enterprise-service-bus-center-of-excellence-charter-template
	Enterprise Service Bus Change Request Template	The ESB Change Request Template is a formal document that will outline both the requested change and any implications associated with it. http://www.infotech.com/research/enterprise-service-bus-change-request-template
	Enterprise Service Bus Project Charter Template	The ESB Project Charter is a formal document that will provide a comprehensive overview of the ESB project. The Charter can be used to convey information about the project to stakeholders in a clear and concise manner, which can increase buy-in. http://www.infotech.com/research/enterprise-service-bus-project-charter-template
	Enterprise Service Bus Communication Plan Template	The ESB Communication Plan is an internal document that will create visibility and awareness into the ESB project, and will help educate the ESB team on internal processes around how information is created, used, and distributed. http://www.infotech.com/research/enterprise-service-bus-communication-plan-template
Blueprint: Implement and Optimize Application Integration Governance		
	Implement and Optimize Application Integration Governance	Enterprises often see the value of, or need to, integrate their applications through service-oriented architecture or some other framework, but often don't consider the need to govern these integrated applications properly. http://www.infotech.com/research/it-improve-application-integration-governance
	Storyboard: Implement and Optimize Application Integration Governance	The governance of Application Integration (AI) is often overlooked when developing an AI framework. Determine what governance model is right for you now to get the most out of your integrated apps and avoid headaches in future. http://www.infotech.com/research/it-storyboard-implement-and-optimize-your-application-integration-governance
	AI Governance Gap Analysis Tool	Determining your strengths and weaknesses in Application Integration (AI) Governance will help you better implement and optimize your AI Governance model. Use this template to see where you fall short so you can properly focus your optimization efforts. http://www.infotech.com/research/ai-governance-gap-analysis-tool

Type	Document	Description
	Integration Center of Competency Charter Template	Establishing an Integration Center of Competency is an important component of the implementation of application integration governance. This charter outlines its purpose, agenda, membership, and mandate so there is no ambiguity about governance. http://www.infotech.com/research/it-integration-center-of-competency-charter
	Application Integration Guiding Principles Template	Establishing proper principles and guidelines for application integration (AI) is an important component of the implementation of AI Governance. This template outlines examples of principles and guidelines for use in your our AI Governance model. http://www.infotech.com/research/it-application-integration-principles-and-guidelines-template
	Integration Service Catalog Template	Keeping inventory of your services and interfaces is a necessary component of proper Application Integration. This is a customizable template that allows you to easily catalog your services and interfaces. http://www.infotech.com/research/it-integration-service-catalog-template
Blueprint: Integrate a Data Audit into the Data Management Plan		
	Data Audit Gap Analysis	The Data Audit Gap Analysis Tool identifies the areas in which your data architecture and management practices can be modified for improvement. Use this template to see where you fall short so you can properly focus your optimization efforts. http://www.infotech.com/research/data-audit-gap-analysis
	Data Source Inventory Tool	The Data Source Inventory Tool will help you document relevant information pertaining to each data source to act as a point of reference document. http://www.infotech.com/research/it-data-source-inventory-tool
	Data Steward	Data stewards are designated employees with a mandate and accountability for improving the data quality and integrity in their particular business area or data silo. They devise and implement processes and policies to uphold data quality and standardize data management processes. http://www.infotech.com/research/data-steward
	Data Archiving Policy	Information maintained by organizations is a vital asset that should be available to all employees who have a legitimate need for it, consistent with the organization's responsibility to preserve and protect such information by all appropriate means. http://www.infotech.com/research/data-archiving-policy
	Data Access Policy	The value of data as an institutional resource is increased through its widespread and appropriate use; its value is diminished through misuse, misinterpretation, unnecessary restrictions to its access, or failure to maintain quality. http://www.infotech.com/research/it-data-access-policy
	Data Management Policy	Organizations must value access to, and the timeliness, accuracy, and consistency of, information, while fully appreciating the basic security and privacy requirements involved. http://www.infotech.com/research/it-data-management-policy
	Data Entry Policy	The integrity and quality of data and evidence used to inform decision making is central to both the short-term and long-term health of the organization. http://www.infotech.com/research/data-entry-policy-

Type	Document	Description
	Data Cleansing and Quality Policy	Information that is in the possession of organizations should adhere to all the principles of data quality to ensure that the data contained within systems, including paper as well as electronic, is fit for purpose. http://www.infotech.com/research/it-data-cleansing-and-quality-policy
	Data Backup Policy	Organizations need to safeguard their data using regular backups and have it available in the event of a catastrophic system failure. http://www.infotech.com/research/it-data-backup-policy
	Data Change Communication Plan Template	The Data Change Communication Plan will help ensure stakeholders are aware of the data changes happening, how it will affect them, and when it will occur. The Communication Plan will work to provide a smooth roll out of all data initiatives. http://www.infotech.com/research/it-data-change-communication-plan-template
	Data Audit Stakeholder Interview Guide	Data owners, data stewards, and end users are the ones who use the data on a day-to-day basis, and will be able to provide the best information regarding on-going data quality or management issues with the systems. http://www.infotech.com/research/data-audit-stakeholder-interview-guide
	Data Protection Policy	Data protection mechanisms allow information to be provided a greater level of security than can be achieved with system-based protection mechanisms alone. http://www.infotech.com/research/it-data-protection-policy
	Password Policy Template	Passwords are the primary form of user authentication used to grant access to information systems. To ensure that passwords provide as much security as possible they must be carefully created and used. http://www.infotech.com/research/password-policy-template
	Data Security Policy	A strong data security policy should be specific enough to address the unique situation of the enterprise, but general enough to provide coverage on all aspects of the business. Save the long documents for security procedures and standards; with policy, short and to the point is best. http://www.infotech.com/research/data-security-policy
	Data Source Inventory Tool	Use this tool to document what types of data sources exist within the audited department, their location, data access, what the data is used for, and any policies or processes surrounding the data. http://www.infotech.com/research/it-data-source-inventory-tool
	Data Integration and Virtualization Policy	The purpose of this policy is to ensure that organizations mitigate risks to personal privacy when integrating, replicating, or virtualizing personal data, and only integrates, replicates, or virtualizes data when necessary. http://www.infotech.com/research/it-data-integration-and-virtualization-policy
	Data Management Policy	Organizations must value access to, and the timeliness, accuracy, and consistency of, information, while fully appreciating the basic security and privacy requirements involved. http://www.infotech.com/research/it-data-management-policy
	Data Entry Policy	The integrity and quality of data and evidence used to inform decision making is central to both the short-term and long-term health of the organization. http://www.infotech.com/research/data-entry-policy-
	Data Cleansing and Quality Policy	Information that is in the possession of organizations should adhere to all the principles of data quality to ensure that the data contained within systems, including paper as well as electronic, is fit for purpose. http://www.infotech.com/research/it-data-cleansing-and-quality-policy

Type	Document	Description
	Audit Stakeholder Interview Guide	Data owners, data stewards, and end users are the ones who use the data on a day-to-day basis, and will be able to provide the best information regarding on-going data quality or management issues with the systems. http://www.infotech.com/research/it-audit-stakeholder-interview-guide
	Take Stock of Existing Data Inventory	Taking stock, or mapping out an existing data inventory terrain is important to understand where the organization is strong, and where there are gaps. This identification will aid in the process of moving from a chaotic to controlled data architecture. http://www.infotech.com/research/take-stock-of-existing-data-inventory
Blueprint: Move From Chaos to a Realistic Data Integration Strategy		
	Application Integration Method Selection Tool	Use this tool to find the ideal integration method for each of the organization's integrations. http://www.infotech.com/research/it-application-integration-method-selection-tool
	Taxonomy Quality Assurance Policy	Download a copy of this Info-Tech policy for some hard-and-fast rules to ensure your taxonomy stays in tip-top shape. http://www.infotech.com/research/taxonomy-quality-assurance-policy
	Investigate Data Integration Tools	This video will give you some insight into what data integration tools can do for you today, as well as what tiers of solutions are available and some caveats when investigating particular solutions. http://www.infotech.com/research/it-investigate-data-integration-tools
	Data Quality Health Check Tool	The first step to improving data quality is to conduct an audit of prevalent data quality problems are in the organization. There are five key types of data quality problems, ranging from duplicate data to conflicting data. http://www.infotech.com/research/it-data-quality-health-check-tool
	Master Data Record Tool	Leverage the Master Data Record Tool to catalogue systems within the organization to help you determine with which data set you should begin your MDM initiative. http://www.infotech.com/research/it-master-data-record-tool
	Improve Data Quality: Plug the Leak & Bail the Boat	Data quality is a significant issue facing many organizations. Despite the costs and headaches associated with having poor data, most organizations struggle to define and implement a strategy for effectively improving data quality. http://www.infotech.com/research/it-improve-data-quality-plug-the-leak-bail-the-boat
	Data Integration Solution Evaluation & RFP Response Tool	This tool is pre-built with the essential criteria that should be considered when evaluating RFP responses. Use this tool to put hard numbers behind vendor claims, and keep evaluations objective by scoring RFP responses. http://www.infotech.com/research/it-data-integration-solution-evaluation-rfp-response-tool
	Data Integration Tool Readiness Assessment	Data integration (DI) tools provide a wide array of both business and IT benefits, but they are not for everyone. Use this readiness assessment tool to determine if DI tools are right for the organization. http://www.infotech.com/research/it-data-integration-tool-readiness-assessment
	Data Integration Tool Vendor Shortlist	Info-Tech conducted its own market evaluation of 11 leading data integration solutions. Use this tool to narrow the vendors to a shortlist of solutions that best satisfy the organization's requirements, before sending out RFPs and scheduling vendor demonstrations. http://www.infotech.com/research/it-data-integration-tool-vendor-shortlist

Type	Document	Description
	Data Integration Vendor Demonstration Script	This template is designed to provide vendors with a consistent set of instructions to ensure an objective comparison of product features; all while you can evaluate ease-of-use from a user and IT perspective. http://www.infotech.com/research/it-data-integration-vendor-demonstration-script
	Data Integration Solution RFP Template	Issuing RFPs is a critical step in your vendor selection process. This RFP template comes populated with important elements you don't want to forget. A detailed RFP saves time in the selection process and ensures that you select a best-fit solution for the organization. http://www.infotech.com/research/it-data-integration-solution-rfp-template
Vendor Landscape: Application Integration Middleware		
	Vendor Landscape: Application Integration Middleware	Deployment of a middleware solution is an essential strategy for IT departments that are facing growth in the number of applications. Middleware allows companies to future-proof their infrastructure and drive business growth by connecting legacy systems to the latest technology developments. http://www.infotech.com/research/it-vendor-landscape-application-integration-middleware
	Vendor Landscape Storyboard: Application Integration Middleware	IBM continues to dominate the application integration middleware space with its extensive market reach and well-developed solution. Enterprises should consider their middleware solution carefully based on their current application ecosystem. http://www.infotech.com/research/it-vendor-landscape-storyboard-application-integration-middleware
	Application Integration Middleware Vendor Shortlist Tool	This tool allows enterprises to generate a customized shortlist of application integration middleware vendors based on required capabilities and future requirements for areas such as pattern recognition, mobility options, and horizontal scalability. http://www.infotech.com/research/it-application-integration-middleware-vendor-shortlist-tool
Vendor Landscape: Data Integration Tools		
	Vendor Landscape: Data Integration Tools	Many enterprises are unfamiliar with the benefits of data integration tools. These tools provide an enterprise-wide view of data, effectively managing multiple, disparate data sources and freeing up developer resources. http://www.infotech.com/research/vendor-landscape-data-integration-tools
	Vendor Landscape Storyboard: Data Integration Tools	Data Integration (DI) tools provide an enterprise-wide view of data; they effectively manage multiple, disparate data sources and free up developer resources. http://www.infotech.com/research/vendor-landscape-storyboard-data-integration-tools
	Data Integration Tool Vendor Shortlist	Info-Tech conducted its own market evaluation of 11 leading data integration solutions. Use this tool to narrow the vendors to a shortlist of solutions that best satisfy the organization's requirements, before sending out RFPs and scheduling vendor demonstrations. http://www.infotech.com/research/it-data-integration-tool-vendor-shortlist
Vendor Landscape: Managed File Transfer		
	Vendor Landscape: Managed File Transfer	Managed file transfer (MFT) secures and facilitates file transfer; it reduces risk and cost, increases reliability and visibility, and simplifies partner relationships. http://www.infotech.com/research/it-vendor-landscape-managed-file-transfer

Type	Document	Description
	Vendor Landscape Storyboard: Managed File Transfer	Managed file transfer (MFT) secures and facilitates file transfer; it reduces risk and cost, increases reliability and visibility, and simplifies partner relationships. http://www.infotech.com/research/it-vendor-landscape-storyboard-managed-file-transfer
	Managed File Transfer Vendor Shortlist Tool	This tool allows organizations to generate a customized shortlist of managed file transfer (MFT) solutions based on required capabilities such as product features, architecture, and usability. http://www.infotech.com/research/it-managed-file-transfer-vendor-shortlist-tool
Additional Resources		
	Enterprise Service Bus Solution Design Deck	Use this PowerPoint template to provide your ESB team with an overview of the architecture and functional requirements of the ESB. Get your team aligned. http://www.infotech.com/research/enterprise-service-bus-solution-design-deck
	Data Integration 101	As a business develops, the number of point-to-point integrations grows to become a hopelessly tangled web of integrations. Data integration can bring order to data chaos to increase accuracy and consistency, decrease redundancies, and make managing the ongoing data architecture a more efficient process. http://www.infotech.com/research/data-integration-101
	Five Key SOA Themes from the Field	Although moving to a Service-Oriented Architecture (SOA) can enhance business and IT agility, the sheer complexity and scope of the migration make this a potentially pitfall-ridden process. When embarking on an enterprise SOA initiative, IT leaders must heed key lessons learned by seasoned implementers. http://www.infotech.com/research/five-key-soa-themes-from-the-field
	SOA & Business: Communication Tips to Bridge the Divide	Convince business stakeholders to buy into Service Oriented Architecture (SOA) by demonstrating the benefits that enhance the business and by highlighting the factors that make a positive impact on enterprise revenue. Focus on the long term, shifting the persuasive focus from how SOA saves money to how SOA makes the organization more money. http://www.infotech.com/research/soa-business-communication-tips-to-bridge-the-divide
	Drive SOA Success with a Data Integration Game Plan	Data integration plays a vital role in an enterprise Service-Oriented Architecture (SOA) strategy. Understand the value and importance of data integration to the creation of data services and how upfront planning can help maximize SOA benefits and mitigate risk. http://www.infotech.com/research/drive-soa-success-with-a-data-integration-game-plan
	SOA Basics: Features and Benefits	This is the second of two notes on the basics of Service-oriented Architecture. Info-Tech covers the key features and technological improvements associated with SOA, and the business benefits it provides. Follow Info-Tech's recommendations to avoid common pitfalls when embarking on the road to SOA deployment. http://www.infotech.com/research/soa-basics-features-and-benefits

Type	Document	Description
🗋	SOA Basics: What is SOA?	What is Service-Oriented Architecture (SOA)? Few in IT have a solid definition of the concept, given the many products and vendors that misbrand using the SOA label. This is the first of two notes on the basics of Service-oriented Architecture, defining and outlining its most compelling business benefits. Find out why the majority of enterprises are turning to SOA as the guiding principle when creating mission critical applications and processes. http://www.infotech.com/research/soa-basics-what-is-soa
🗋	SOA and Unified Communications: Present-Day Partnership Pays Future Dividends	Tighter integration between enterprise applications, communication tools, and business processes creates a more efficient enterprise. However, a lack of technical skills and disconnected internal planning often limit this synergy. While vendor solutions can take care of the technology aspect, IT leaders must champion the effort to align application and infrastructure planning groups. http://www.infotech.com/research/soa-and-unified-communications-present-day-partnership-pays-future-dividends
🗋	SOA and Unified Communications: Bridging the Divide	Many firms that have adopted Service Oriented Architecture (SOA) policies are now ready to take a step forward towards an integrated enterprise. Unified Communications (UC) is a logical next step, with governance principles that closely parallel SOA strategy. Unlock the natural synergies between SOA and UC to get the most value from both. http://www.infotech.com/research/soa-and-unified-communications-bridging-the-divide
🖶	Building a Solid Web-Based Customer Service Toolbox	Web-based customer service is a critical component of customer service strategy that both private and public sector organizations and their customers rely on every day. A variety of Web-based customer service technologies are available that provide value in different ways, in different service situations. Apply the attributes of different Web-based customer service technologies together to derive optimal customer service value. http://www.infotech.com/research/building-a-solid-web-based-customer-service-toolbox
🗋	Enterprise Service Bus Drives a Solid SOA	Service-Oriented Architecture (SOA) can provide solid, near-term benefits to enterprises if they invest in the right messaging technologies. IT executives should build their SOA deployment using ESB to gain the benefits of security, scalability, and reliability. http://www.infotech.com/research/enterprise-service-bus-drives-a-solid-soa
🗋	Selecting Web Services Specifications for SOA	CIOs must be able to understand and select the right Web services specifications for their SOA initiative. Use this selection strategy to identify the Web service specifications that are essential to a successful SOA transition. http://www.infotech.com/research/selecting-web-services-specifications-for-soa

Systems Integration: Partner Integration

Type	Document	Description
▶	Manage Your E-Commerce Strategy	With e-commerce, your philosophy should be "Build a business, not a Website." First and foremost, an e-commerce Website is a business; the Website itself is simply the delivery channel. To truly be effective with your e-commerce site you must start by understanding and defining your business strategy, goals and metrics for the site, and then designing and developing a site that is tailored to meet those goals through proper planning. http://www.infotech.com/research/it-manage-your-e-commerce-strategy

Infrastructure Research

Desktop & Mobile Devices Research

Desktop & Mobile Devices: Desktop & Mobile Infrastructure

Type	Document	Description
	Disruptive Technology SWOT Analysis and Tech Monitor Tool	Perform a disruptive technology analysis annually. Use this tool to identify foundational and disruptive technologies that will affect the enterprise, analyze them, and predict their value and readiness. http://www.infotech.com/research/it-disruptive-technology-swot-analysis-and-tech-monitor-tool
	Disruptive Technology SWOT Analysis and Tech Monitor Tool	Perform a disruptive technology analysis annually. Use this tool to identify foundational and disruptive technologies that will affect the enterprise, analyze them, and predict their value and readiness. http://www.infotech.com/research/it-disruptive-technology-swot-analysis-and-tech-monitor-tool

Desktop & Mobile Devices: Desktop/Laptop Hardware

Type	Document	Description
	Laptop Loan Agreement	Some enterprises provide laptop computers for short-term use. Employees can borrow laptops while awaiting service for their regular computer, or for short-term travel. http://www.infotech.com/research/laptop-loan-agreement
	Laptop Loan Policy	When an enterprise provides laptop computers for short-term use they take on certain risks. Mitigate these risks and ensure employees know about their responsibilities in caring for and protecting the physical property and information of the enterprise. http://www.infotech.com/research/laptop-loan-policy
	Drafting a PC Lifecycle Policy: Part One	The fast pace of technology change makes PC purchases quickly outdated. Getting the most business value out of corporate computers requires a long-term strategy that begins with a thorough assessment phase. Plan to save money by following Info-Tech's steps to drafting the first part of a PC lifecycle policy. http://www.infotech.com/research/drafting-a-pc-lifecycle-policy-part-one

	Drafting a PC Lifecycle Policy: Part Two	Drafting a PC lifecycle policy helps control the IT budget. It also helps devise hardware purchasing, deployment, and management strategies that meet business needs. To get the most out of PC purchases, set policies for the intermediate phases of the PC lifecycle. http://www.infotech.com/research/drafting-a-pc-lifecycle-policy-part-two
	Drafting a PC Lifecycle Policy: Part Three	Perhaps one of the most risky phases of the PC lifecycle is the asset retirement phase. To avoid paying unnecessary costs associated with improper PC disposal, a structured set of steps should be followed. http://www.infotech.com/research/drafting-a-pc-lifecycle-policy-part-three

Desktop & Mobile Devices: Mobile/Handheld Devices

Type	Document	Description
	Personal Mobile Device Policy Training Slideshow	User compliance is the strongest determinant of managing personal mobile devices in a safe and efficient manner. Use this training slideshow in conjunction with a personal mobile device policy to ensure that users understand the limits of what they can do with their own devices at work. http://www.infotech.com/research/it-personal-mobile-device-policy-training-slideshow
	GPS Cell Phone Policy	Use this downloadable policy to specify exactly how GPS-enabled cell phones will and will not be used to monitor employee activities. http://www.infotech.com/research/gps-cell-phone-policy
	Special Collection: Consumerization	The shift in corporate attitude towards mobility has had an effect on IT's strategic plans. In order to effectively manage these personalized devices, organizations must combine guidance in the form of policies and technical restrictions, which address standards for required apps, maintenance expectations, corporate data mobility, and much more. http://www.infotech.com/research/it-special-collection-consumerization
	Worth the Risk? Bringing Disease into Hospitals via Mobile Devices	Mobile devices compromise biosecurity and information security. Use management of biosecurity risks as both a carrot and stick to enhance hospital IT security compliance. http://www.infotech.com/research/it-worth-the-risk-bringing-disease-into-hospitals-via-mobile-devices
	The iPad 2: Apple's Magic Tablet Continues Enterprise Domination	The iPad 2 doesn't have any revolutionary new business features, but its cameras, in addition to increased comfort and speed, provide an incremental benefit to the already viable use of iPads in the enterprise. http://www.infotech.com/research/it-the-ipad-2-apples-magic-tablet-continues-enterprise-domination
	2011: Year of the Tablet	Early in 2010, Info-Tech predicted that it would be the year of the tablet. Was the prediction accurate? It was, although many vendors have not moved as quickly as expected getting their tablets to market. By the end of 2011, every major (and minor) consumer and enterprise technology manufacturer will be vying for a share of the rapidly growing tablet market. http://www.infotech.com/research/it-2011-year-of-the-tablet

Infrastructure Management and Governance Research

Infrastructure Management and Governance: Facilities

Type	Document	Description
	Data Center Contractor Selection Scripted Interview	Data center facilities call for specific industrial design and engineering requirements to meet needs for fire-protection, power provisioning, stand-by power, cooling, physical security, and layout. Therefore, selecting a contractor is one of the most important first steps in a data center build. When meeting with the potential contractor, use a scripted interview process to aid in the decision making process. http://www.infotech.com/research/data-center-contractor-selection-scripted-interview

Infrastructure Management and Governance: Infrastructure Costing & Funding

Type	Document	Description
Blueprint: Shift the Budget From IT Maintenance Toward IT Enhancements		
	Shift the Budget From IT Maintenance Toward IT Enhancements	The cost of delivering the same ongoing services typically consumes 85% of IT budgets, leaving little capacity for enhancements to business value. http://www.infotech.com/research/shift-the-budget-from-it-maintenance-toward-it-enhancements
Blueprint: Squeeze More Business Value from Existing Applications		
	Squeeze More Business Value from Existing Applications	Those applications that are already deployed (and upgrades often paid for) can provide additional value beyond the initial set of requirements they addressed. http://www.infotech.com/research/squeeze-more-business-value-from-existing-applications
Blueprint: Don't Go Overboard Formalizing Service Delivery		
	Don't Go Overboard Formalizing Service Delivery	Many organizations struggle to get a handle on service delivery--they have no formal system for delivery and business users are not satisfied. http://www.infotech.com/research/dont-go-overboard-formalizing-service-delivery
Blueprint: Use Metrics for Competitive Advantage		
	Use Metrics for Competitive Advantage	Metrics programs frequently fail because little attention has been paid to what the objectives are and what should actually be measured. http://www.infotech.com/research/use-metrics-for-competitive-advantage
Blueprint: Go Agile		
	Go Agile	Today's business environment is defined by rapidly changing technologies, market conditions, and business models. http://www.infotech.com/research/go-agile
Blueprint: Embrace the Cloud		
	Embrace the Cloud	Many organizations are still leery of the cloud and hesitate to consider it as a serious option for IT applications or infrastructure. http://www.infotech.com/research/embrace-the-cloud
Blueprint: Enable a Truly Mobile Workforce		
	Enable a Truly Mobile Workforce	Organizations can improve staff productivity and engagement by leveraging this same technology and, in some cases, staff-owned devices. http://www.infotech.com/research/enable-a-truly-mobile-workforce

Blueprint: Don't Let Security Concerns Prevent New Technology Adoption		
	Don't Let Security Concerns Prevent New Technology Adoption	New mobility technologies, and the Cloud create new risks to the security and privacy of data managed by IT. http://www.infotech.com/research/dont-let-security-concerns-prevent-new-technology-adoption
	Infrastructure Assessment	A technical infrastructure gap can be a weakness or hole in your computing and networking platforms. Use Info-Tech's "Infrastructure Assessment" tool to help gauge the quality and suitability of your computing and networking platforms and to identify existing gaps. http://www.infotech.com/research/infrastructure-assessment
	Infrastructure TCO Comparison Tool	TCO is an important consideration when deciding on an infrastructure upgrade. Comparative analysis of TCO can help you decide whether to move forward with a project. If moving forward makes sense, presenting cost details can help you justify your proposed project to secure funding. http://www.infotech.com/research/infrastructure-tco-comparison-tool

Infrastructure Management and Governance: Infrastructure Staffing

Type	Document	Description
	Account Privileges and Expiry Policy	Download and tailor this account privileges expiry policy to exorcise "ghost workers" from your network. http://www.infotech.com/research/account-privileges-and-expiry-policy
	How to Identify and Retain Key Network Staff	Key members of the network staff are important assets for most enterprises. Implementing appropriate measures to achieve a high level of employee retention within their ranks must be considered. However, the first requirement is to identify those key individuals and then take the appropriate steps to help them grow and entice them to stay. http://www.infotech.com/research/how-to-identify-and-retain-key-network-staff

Infrastructure Research

Infrastructure: Asset Management

Type	Document	Description
Blueprint: Reduce Costs and Audit Hassles through Effective IT Asset Management		
	Reduce Costs and Audit Hassles through Effective IT Asset Management	Audits, budgeting, and project planning all have one thing in common: Data. Without an active Asset Management practice in place, IT is challenged to find and analyse the data to inform these projects and reduce asset spending. http://www.infotech.com/research/reduce-costs-and-audit-hassles-through-effective-it-asset-management
	Storyboard: Reduce Costs and Audit Hassles through Effective IT Asset Management	Use the asset management blueprint to guide you from approval to implementation of an IT asset management solution. http://www.infotech.com/research/storyboard-reduce-costs-and-audit-hassles-through-effective-it-asset-management
	ITAM Action Plan Roadmap	Use this tool to manage the ITAM implementation project. http://www.infotech.com/research/itam-action-plan-roadmap

Type	Document	Description
	ITAM Business Case and Project Charter	This template is used as to guide a client through the process of building a business case for getting the ITAM project approved. The tool then can be used as a project charter to record project milestones and goals. http://www.infotech.com/research/itam-business-case-and-project-charter
	ITAM RFP Scoring Tool	Organizations in the ITAM tool selection process must fairly score potential vendors and their product offerings. Use this tool to quickly and easily compare the results of the RFP responses. http://www.infotech.com/research/it-itam-rfp-scoring-tool
	ITAM RFP Template	Organizations who are struggling to reconcile requirements with vendor competencies should make use of this RFP template to navigate the ITAM vendor landscape. http://www.infotech.com/research/it-itam-rfp-template
	ITAM ROI Calculator	This calculator provides a page-by-page tool to record and analyze the relevant assets, risks and technology costs related to asset management. http://www.infotech.com/research/itam-roi-calculator
Blueprint: Automate the IT Asset Management Solution		
	Automate the IT Asset Management Solution	Any IT environment with more than 250 assets will experience challenges in tracking inventory and keeping it current if they are using spreadsheets. http://www.infotech.com/research/automate-the-it-asset-management-solution
	Storyboard: Automate the IT Asset Management Solution	Management of IT assets truly requires a combination of people, process and technology. Automation of IT Asset Management (ITAM) will enable significant benefits through software and hardware cost savings, reduced risk through lost equipment or out of compliance software and efficiencies gained through the discovery process and integration of ITSM. http://www.infotech.com/research/storyboard-automate-the-it-asset-management-solution
	RFID ROI Calculator	Large quantities of assets can be quickly inventoried and located using RFID. Where equipment is highly mobile or has a high probability of theft, RFID can be particularly useful. http://www.infotech.com/research/it-rfid-roi-calculator
	Software Asset Management ROI Calculator	Use Info-Tech's Software Asset Management (SAM) ROI Calculator to assess the financial impact and ROI of a SAM program, and experience software savings. http://www.infotech.com/research/it-software-asset-management-roi-calculator
	ITAM Project Charter Template	A successful IT Asset Management (ITAM) implementation starts with a great plan. The ITAM project charter provides a template to help you build a business case, and plan and organize your implementation. http://www.infotech.com/research/it-itam-project-charter-template
	Automated ITAM Tool Selection	IT Asset Management (ITAM) benefits are most readily available with the use of automated tools. The ITAM Vendor Landscape will help you choose the tool that is right for your organization. http://www.infotech.com/research/it-automated-itam-tool-selection
	ROI Calculator for Software Assurance Benefits	Each organization will have different priorities for the use of Software Assurance (SA). Use this tool to calculate the true dollar value of SA to build your business case for or against SA in your organization. http://www.infotech.com/research/roi-calculator-for-microsoft-software-assurance-benefits

Type	Document	Description
	ITAM RFP Scoring Tool	Organizations in the ITAM tool selection process must fairly score potential vendors and their product offerings. Use this tool to quickly and easily compare the results of the RFP responses. http://www.infotech.com/research/it-itam-rfp-scoring-tool
	ITAM RFP Template	Organizations who are struggling to reconcile requirements with vendor competencies should make use of this RFP template to navigate the ITAM vendor landscape. http://www.infotech.com/research/it-itam-rfp-template
Blueprint: Develop a Comprehensive Hardware Asset Management Strategy		
	Develop a Comprehensive Hardware Asset Management Strategy	Just like any worthwhile IT project, HAM requires time and effort to put the right people in place, adjust processes, and implement the right technology. http://www.infotech.com/research/it-develop-a-comprehensive-hardware-asset-management-strategy
	Storyboard: Develop a Comprehensive Hardware Asset Management Strategy	Hardware asset management (HAM) is an important aspect of an organization's IT asset management practice, but it is often viewed as a cost center. In fact, lifecycle HAM provides numerous benefits including savings on equipment costs and insurance, gains in service management efficiencies, and the peace of mind that comes with knowing you are meeting regulatory requirements. http://www.infotech.com/research/it-storyboard-develop-a-comprehensive-hardware-asset-management-strategy
	Hardware Asset Management Readiness Assessment	This tool will help determine the appropriateness of implementing a hardware asset management practice, as well as providing an understanding of the potential benefits and helping identify the maturity state to which your organization aspires. http://www.infotech.com/research/it-hardware-asset-management-readiness-assessment
	Equipment Use Policy	This document has been designed to inform employees and end users of best practices and policies. It will define standards, procedures, and restrictions to protect company-owned equipment and any sensitive data stored therein. http://www.infotech.com/research/it-equipment-use-policy
	Hardware Asset Disposition Policy	This policy will help establish and define standards, procedures, and restrictions for the disposition of non-leased IT equipment in a legal, cost-effective manner. The resulting document is therefore intended for both HAM project scoping and for reuse in future projects. http://www.infotech.com/research/asset-disposal-policy
	Hardware Asset Management	Hardware Asset Management (HAM) is an important aspect of an organization's IT asset management practice, but it is often viewed as a cost center. In fact, lifecycle HAM provides numerous benefits, including savings on equipment costs and insurance, gains in service management efficiencies, and the peace of mind that comes with knowing you are meeting regulatory requirements. http://www.infotech.com/research/it-hardware-asset-management
Blueprint: Make Sense of MS System Center ConfigMgr Data to Save Up to 35%		
	Make Sense of MS System Center ConfigMgr Data to Save Up to 35%	Microsoft System Center Configuration Manager (SCCM) alone is not sufficient for effective asset management. This blueprint shows you how to complement SCCM with third-party that provide reports, dashboards, and integration with IT and business workflows. http://www.infotech.com/research/make-sense-of-ms-system-center-configmgr-data-to-save-up-to-35

Type	Document	Description
	Storyboard: Make Sense of MS System Center ConfigMgr Data to Save Up to 35%	Using Microsoft System Center Configuration Manager alone is not sufficient for effective asset management. http://www.infotech.com/research/storyboard-make-sense-of-ms-system-center-configmgr-data-to-save-up-to-35
	ITAM Add-Ons for SCCM Shortlist Tool	This tool helps you generate and evaluate a shortlist of ITAM add-ons for Microsoft System Center Configuration Manager. http://www.infotech.com/research/itam-add-ons-for-sccm-shortlist-tool
	Software License Self-Audit Worksheet	Use this tool to conduct a software self-audit. The worksheet will help you identify potential cost savings in the form of unused software, and risks in the form of non-compliant installs. http://www.infotech.com/research/software-license-self-audit-worksheet
	ITAM Add-Ons for SCCM Project Workbook	This template accompanies the MS System Center ConfigMgr Data blueprint as a working repository for outputs. Contents of this document should eventually be copied or transcribed - with editing - to an SOP document and/or communications documents. http://www.infotech.com/research/itam-add-ons-for-sccm-project-workbook
	ITAM Demonstration Script Template	This demonstration script template is designed to provide vendors with a consistent set of instructions. This ensures equivalent product demonstrations to allow for an objective comparison of product features. http://www.infotech.com/research/it-itam-demonstration-script-template
	Corporate Software Asset Management Policy	This template will help your organization develop a policy that reduces the occurrence of pirated software licenses within your establishment. http://www.infotech.com/research/it-corporate-software-asset-management-policy
Blueprint: Manage Software Assets Efficiently		
	Manage Software Assets Efficiently	This solution set will provide guidance on how best to manage your hardware and software inventory process, plus helpful tools and practical advice on conducting an audit. http://www.infotech.com/research/get-a-handle-on-it-assets-and-software-licenses
	Storyboard: Manage Software Assets Efficiently	Software Asset Management (SAM) is a formalized process used to minimize the risks associated with pirated or non-compliant software, reduce software costs, and create efficiencies in procuring, managing, and distributing software. http://www.infotech.com/research/it-storyboard-manage-software-assets-efficiently
	Software Asset Management ROI Calculator	Use Info-Tech's Software Asset Management (SAM) ROI Calculator to assess the financial impact and ROI of a SAM program, and experience software savings. http://www.infotech.com/research/it-software-asset-management-roi-calculator
	Software Asset Management Request Processes	Organizations must follow a set of procedures when purchasing, installing, or uninstalling software in order to ensure that licenses are monitored and maintained. http://www.infotech.com/research/it-software-asset-management-request-processes
	Software Asset Management License Inventory	This License Inventory template can facilitate license tracking in time of audit, and can be used as part of the due diligence process in creating formal documentation of licensed assets. http://www.infotech.com/research/license-inventory-template

Type	Document	Description
	Corporate Software Asset Management Policy	This template will help your organization develop a policy that reduces the occurrence of pirated software licenses within your establishment. http://www.infotech.com/research/it-corporate-software-asset-management-policy
	Software Asset Management Intellectual Property Use Policy	Educate employees on the importance of adhering to intellectual property legislation and enforce policies at the corporate level to reduce the occurrence of pirated software. http://www.infotech.com/research/it-software-asset-management-intellectual-property-use-policy
	Hardware Asset Disposition Policy	This policy will help establish and define standards, procedures, and restrictions for the disposition of non-leased IT equipment in a legal, cost-effective manner. The resulting document is therefore intended for both HAM project scoping and for reuse in future projects. http://www.infotech.com/research/asset-disposal-policy
	Microsoft Office 365: What's the Appeal?	Office 365, Microsoft's newest Web-based offering provides Microsoft's core server applications with their Web-based productivity suite. http://www.infotech.com/research/microsoft-office-365-whats-the-appeal
	Video: Software Asset Management	Implement Software Asset Management to reduce costs and improve processes. http://www.infotech.com/research/it-software-asset-management
Blueprint: Implement IT Asset Management to Rightsize Costs and Reduce Risks		
	Implement IT Asset Management to Rightsize Costs and Reduce Risks	This new Guided Implementation Blueprint will help infrastructure managers create a plan to tackle asset management, assign role of asset manager and initiate an asset management practice. Clients will learn how asset management can enhance many of IT's initiatives through better data collection and analysis, and potentially reduce the overall IT budget by as much as 5% through best practices. http://www.infotech.com/research/implement-it-asset-management-to-rightsize-costs-and-reduce-risks
Blueprint: Review Microsoft Licensing to Save 25%		
	Review Microsoft Licensing to Save 25%	Optimize your Microsoft licensing by taking a cyclical approach to licensing review and documenting the results. http://www.infotech.com/research/it-review-microsoft-licensing-to-save-25
	Storyboard: Review Microsoft Licensing to Save 25%	Optimize your Microsoft licensing by taking a cyclical approach to licensing review and documenting the results. http://www.infotech.com/research/it-storyboard-review-microsoft-licensing-to-save-25
	Microsoft Licensing Effective License Position (ELP) Template	The Microsoft licensing ELP template helps organizations to determine the difference between the number of Microsoft software licenses they owned, and the number of software copies deployed. This is known as the organization's Effective License Position (ELP). http://www.infotech.com/research/it-microsoft-licensing-effective-license-position-elp-template
	Microsoft Licensing Purchase Reference Guide	Use this template to capture licensing stakeholder information, proposed changes to licensing, and negotiation items. http://www.infotech.com/research/it-microsoft-licensing-purchase-reference-guide

Type	Document	Description
	ITAM RFP Scoring Tool	Organizations in the ITAM tool selection process must fairly score potential vendors and their product offerings. Use this tool to quickly and easily compare the results of the RFP responses. http://www.infotech.com/research/it-itam-rfp-scoring-tool
	ITAM Demonstration Script Template	This demonstration script template is designed to provide vendors with a consistent set of instructions. This ensures equivalent product demonstrations to allow for an objective comparison of product features. http://www.infotech.com/research/it-itam-demonstration-script-template
	ITAM RFP Template	Organizations who are struggling to reconcile requirements with vendor competencies should make use of this RFP template to navigate the ITAM vendor landscape. http://www.infotech.com/research/it-itam-rfp-template
	Automated ITAM Tool Selection	IT Asset Management (ITAM) benefits are most readily available with the use of automated tools. The ITAM Vendor Landscape will help you choose the tool that is right for your organization. http://www.infotech.com/research/it-automated-itam-tool-selection
Vendor Landscape: IT Asset Management - Enterprise		
	Vendor Landscape: IT Asset Management - Enterprise	A solid asset management practice is essential to understanding and managing costs associated with IT assets. http://www.infotech.com/research/vendor-landscape-it-asset-management-enterprise
	Vendor Landscape Storyboard: IT Asset Management -Enterprise	Organizations needing to control costs of equipment and software will find it nearly impossible to effectively manage without automated asset discovery, workflows, and integrated contract management. http://www.infotech.com/research/vendor-landscape-storyboard-it-asset-management-enterprise
	Enterprise IT Asset Management Software Vendor Shortlist Tool	This tool generates a shortlist of asset management software providers who focus on the large enterprise based on necessary capabilities and requirements. http://www.infotech.com/research/enterprise-it-asset-management-software-vendor-shortlist-tool
Vendor Landscape: IT Asset Management - Mid-Market		
	Vendor Landscape: IT Asset Management - Mid-Market	Identify an asset management solution that meets your organization's specific use case without overpaying for unnecessary features. http://www.infotech.com/research/vendor-landscape-it-asset-management-mid-market
	Vendor Landscape Storyboard: IT Asset Management - Mid-Market	Organizations needing to control costs of equipment and software will find it nearly impossible to effectively manage without automated asset discovery, workflows, and integrated contract management. http://www.infotech.com/research/vendor-landscape-storyboard-it-asset-management-mid-market
	Mid-Market IT Asset Management Software Vendor Shortlist Tool	This tool generates a shortlist of asset management software providers who focus on the mid-market based on necessary capabilities and requirements. http://www.infotech.com/research/mid-market-it-asset-management-software-vendor-shortlist-tool

Additional Resources		
	Hardware Asset Management Request Processes	These templates will help integrate hardware asset management into each aspect of the hardware lifecycle in order to accurately track equipment and support costs, and ensure an up-to-date inventory. Include the IT department in the process for faster adoption. http://www.infotech.com/research/it-hardware-asset-management-request-processes

Infrastructure: Availability & Capacity Management

Type	Document	Description
Blueprint: Stop Just Managing Capacity by Moving to a Capacity-as-a-Service Strategy		
	Stop Just Managing Capacity by Moving to a Capacity-as-a-Service Strategy	Capacity management and planning is a thankless task. Enable the infrastructure team by adopting best-practice frameworks and providing professional development opportunities for using analytics as part of their own activities. http://www.infotech.com/research/stop-just-managing-capacity-by-moving-to-a-capacity-as-a-service-strategy
	Storyboard: Stop Just Managing Capacity by Moving to a Capacity-as-a-Service Strategy	Capacity management and planning is a thankless task. Enable the infrastructure team by adopting best-practice frameworks and providing professional development opportunities for using analytics as part of their own activities. http://www.infotech.com/research/storyboard-stop-just-managing-capacity-by-moving-to-a-capacity-as-a-service-strategy
	Capacity Analysis Tool	The Capacity Analysis Tool is used to support capacity planning activities including service design, metric design, and capacity analytics. http://www.infotech.com/research/capacity-analysis-tool
	Capacity Planning Project Plan	Capacity planning projects require input and communication with both internal and external stakeholders. Use this template to communicate your needs to be successful. http://www.infotech.com/research/capacity-planning-project-plan
	IT Service Design Survey and Descriptor Library	Build a successful capacity planning program by aligning the priorities and descriptions of IT services. Survey both IT and key business units to understand the critical services and the typical usage of those services. http://www.infotech.com/research/it-service-design-survey-and-descriptor-library
Blueprint: Exploit New Data Center Architectures to Reduce Infrastructure Footprint and Costs		
	Exploit New Data Center Architectures to Reduce Infrastructure Footprint and Costs	From software defined networks, to microservers, to server-side flash, prepare to exploit tomorrow's disruptive infrastructure technologies today. http://www.infotech.com/research/exploit-new-data-center-architectures-to-reduce-infrastructure-footprint-and-costs
	Storyboard: Exploit New Data Center Architectures to Reduce Infrastructure Footprint and Costs	From software-defined networks, to microservers, to server side flash, prepare to exploit tomorrow's disruptive infrastructure technologies today. http://www.infotech.com/research/storyboard-exploit-new-data-center-architectures-to-reduce-infrastructure-footprint-and-costs

Type	Document	Description
	Emerging Technologies SWOT and Tech Monitor Tool	Perform an emerging technology analysis annually. This will provide a process for identifying emerging technology opportunities in your organization and produce written documents for communicating plans to other business units. http://www.infotech.com/research/emerging-technologies-swot-and-tech-monitor-tool
	Roadmap Building Tool	This tool will help you establish a high-level view of the key actions and assets required around a specific initiative or goal. http://www.infotech.com/research/roadmap-building-tool
	Infrastructure Roadmap SOP Template	A standard operating procedure (SOP) is one of the most critical communications for maintaining a process like the Infrastructure roadmap. All stakeholders must understand and agree on the objectives and important characteristics of the Infrastructure roadmap, before it has started. http://www.infotech.com/research/infrastructure-roadmap-sop-template
	Technology Exploitation Plan Template	Build an exploitation plan to avoid future shock and promote future benefit. Evaluate disruptive trends in server and storage architecture and weave planning for these changes into your longer-term infrastructure roadmap. http://www.infotech.com/research/technology-exploitation-plan-template
Blueprint: Improve IT-Business Alignment with an Infrastructure Roadmap		
	Improve IT-Business Alignment with an Infrastructure Roadmap	Create a broad view of the organization's direction and next steps for IT infrastructure, especially with regard to investments and long-term commitments. Special attention will be paid to dealing with uncertainty and change, and communicating value to stakeholders. http://www.infotech.com/research/improve-it-business-alignment-with-an-infrastructure-roadmap
	Storyboard: Improve IT-Business Alignment with an Infrastructure Roadmap	Create a broad view of the organization's direction and next steps for IT infrastructure, especially with regard to investments and long-term commitments. Special attention will be paid to dealing with uncertainty and change, and communicating value to stakeholders. http://www.infotech.com/research/storyboard-improve-it-business-alignment-with-an-infrastructure-roadmap
	Infrastructure Roadmap Stakeholder Survey	Quantify and compare the relative importance of various business priorities as they relate to IT infrastructure. http://www.infotech.com/research/infrastructure-roadmap-stakeholder-survey
	Infrastructure Roadmap Workbook	Use this workbook to document and update information and decisions from your infrastructure roadmapping process. http://www.infotech.com/research/infrastructure-roadmap-workbook
	Emerging Technology Radar	Analyze the value and readiness of emerging technologies for your organization as part of your annual technology roadmapping process. http://www.infotech.com/research/emerging-technology-radar
	Roadmap Workshop Breakout Templates	Use these templates to gather information in preparation for building your infrastructure roadmap. http://www.infotech.com/research/roadmap-workshop-breakout-templates
	Legacy Technology Watchlist	This tool is designed to help IT infrastructure managers document, prioritize, and visualize the relative criticality and effort required for a portfolio of legacy technology assets. http://www.infotech.com/research/legacy-technology-watchlist
	Infrastructure Roadmap Final Report	Customize the components within this template to serve as both communication and documentation purposes. http://www.infotech.com/research/infrastructure-roadmap-final-report

Type	Document	Description
	Infrastructure Roadmap SOP	Maintaining continuity through the roadmapping process is more important than the roadmap itself. http://www.infotech.com/research/infrastructure-roadmap-sop
Blueprint: Plan the Best Infrastructure for Your Organization		
	Plan the Best Infrastructure for Your Organization	Knowing when and how to invest in a significant infrastructure change rather than a minor incremental purchase is difficult. http://www.infotech.com/research/plan-the-best-infrastructure-for-your-organization
	Data Center Energy Efficiency Calculator	Capturing and analyzing efficiency metrics can improve management decision-making. Use this tool to optimize power utilization and cooling in the data center. http://www.infotech.com/research/data-center-energy-efficiency-calculator
	EMR Readiness Assessment	This downloadable readiness assessment questionnaire can help determine if your healthcare enterprise is ready to embark on Electronic Medical Records adoption. http://www.infotech.com/research/emr-readiness-assessment
	Measuring the Economic Health of IT, Post-Recession	Info-Tech's analysis of IT budgets across North America reveals a strong upward trend since 2009. Organizations are benefiting from the economic recovery and the effects of government incentive programs such as the American Recovery and Reinvestment Act (ARRA). http://www.infotech.com/research/it-measuring-the-economic-health-of-it-post-recession
	Infrastructure Capacity Assessment Tool	Changes to applications, archived data and systems can put capacity pressure on your infrastructure. Complete this worksheet to help you to understand what infrastructure investments you should consider, based on your existing capacity and projected capacity requirements. http://www.infotech.com/research/infrastructure-capacity-assessment-tool
	Infrastructure Availability and Performance Assessment Tool	Infrastructure change can range in scope and scale. Use this tool to identify the best area(s) to focus your infrastructure efforts. http://www.infotech.com/research/infrastructure-availability-and-performance-assessment-tool
	Planning Effective Infrastructure Changes	Your IT infrastructure should evolve according to changes in business needs and as better technology options are introduced. This video will help you plan infrastructure change, identify cost-saving options, and secure approval for your investments. http://www.infotech.com/research/planning-effective-infrastructure-changes
	Free Up Funds for New Initiatives	Organizations must continue efforts to reduce the high proportion of their IT budget spent (typically 70%) on continuing operations, to provide room for new initiatives that management expects IT to deploy. http://www.infotech.com/research/it-free-up-funds-for-new-initiatives
Blueprint: Understand Hot Trends in Infrastructure		
	Understand Hot Trends in Infrastructure	The primary mission of the infrastructure professional is deployment and maintenance of platforms that enable applications and services. Evaluate how these hot developments can boost achievement in that critical role. http://www.infotech.com/research/it-understand-hot-trends-in-infrastructure
	Storyboard: Understand Hot Trends in Infrastructure	The primary mission of the infrastructure professional is deployment and maintenance of platforms that enable applications and services. Evaluate how these hot developments can boost achievement in that critical role. http://www.infotech.com/research/storyboard-understand-hot-trends-in-infrastructure

Type	Document	Description
	Case Study: Intact Financial Corporation	The rise in usage of mobile devices means that enterprise business is no longer being conducted only within the confines of the physical building. Factor in personal device usage by employees and you've got the potential for security breaches and escalating telecom costs. http://www.infotech.com/research/it-case-study-intact-financial-corporation
	Case Study: City of Mesa	As companies grow, consolidation of resources is inevitable, particularly with the growing movement towards virtualization. If you are maintaining a legacy platform, it may be time to consider a consolidation-in-a-box solution. http://www.infotech.com/research/it-case-study-city-of-mesa
Additional Resources		
	Negotiate Favorable Telecom and Mobility Contracts	Avoid contract pitfalls and get a fair price on your telecom and mobility contracts. http://www.infotech.com/research/it-negotiate-favorable-telecom-and-mobility-contracts
	Cisco Buyer's Advice	Understand Cisco's distribution model to optimize your spending and ensure you are getting the best deal. http://www.infotech.com/research/it-cisco-buyer-advice
	Detect Server Snags before They Hamstring Apps	Without ongoing server resource monitoring, the first indication of a performance issue may be when application response jumps from one or two seconds to 10 or 20 seconds. By proactively monitoring servers, potential problems may be identified and rectified before they impact application performance. http://www.infotech.com/research/detect-server-snags-before-they-hamstring-apps

Infrastructure: Cloud Strategy

Type	Document	Description
Blueprint: Create a Corporate Personal Cloud Vision in Two Days		
	Create a Corporate Personal Cloud Vision in Two Days	Own the corporate personal cloud to boost service while managing risk and maintaining appropriate controls. http://www.infotech.com/research/it-create-a-corporate-personal-cloud-vision-in-two-days
	Storyboard: Create a Corporate Personal Cloud Vision in Two Days	Workforce computing has gone beyond the desktop to the cloud. Lead the corporate personal cloud development to boost workforce computing without losing control. http://www.infotech.com/research/it-storyboard-create-a-corporate-personal-cloud-vision-in-two-days
	Corporate Personal Cloud Assessment	Info-Tech's Corporate Personal Cloud Assessment Tool will help you evaluate current state, level of readiness, and priorities for enabling personal clouds. http://www.infotech.com/research/corporate-personal-cloud-assessment
	Personal Cloud Requirements Document	Determine what requirements are necessary for your organization to enable the personal cloud. http://www.infotech.com/research/it-personal-cloud-requirements-document
Blueprint: Create a Game Plan to Implement Cloud Backup the Right Way		
	Create a Game Plan to Implement Cloud Backup the Right Way	The cloud isn't a magic bullet for backups. Build a strategy that fits your needs and mitigates critical cloud challenges. http://www.infotech.com/research/create-a-game-plan-to-implement-cloud-backup-the-right-way

Type	Document	Description
	Storyboard: Create a Game Plan to Implement Cloud Backup the Right Way	There is a lot of hype and a lot of fear around targeting backups at the cloud. Complete this blueprint to get a sense of the real risks and rewards of cloud backup. http://www.infotech.com/research/storyboard-create-a-game-plan-to-implement-cloud-backup-the-right-way
	Cloud Backup Implementation Game Plan Tool	The tool will assist you in evaluating the value of cloud backup for specific candidate data sets, readiness to target backup at the cloud, compare the TCO of the cloud versus on-premises, assess the risk involved, and create a roadmap to begin the cloud backup initiative. http://www.infotech.com/research/cloud-backup-implementation-game-plan-tool
Additional Resources		
	Corporate Personal Cloud Strategy Summary	Use Info-Tech's Corporate Personal Cloud Strategy Summary Deck to outline and document your organization's Personal Cloud goals. http://www.infotech.com/research/it-corporate-personal-cloud-strategy-summary
	Enabling Corporate Personal Clouds	Use Info-Tech's corporate personal cloud communication deck to aid your communication effort when informing the organization about your corporate personal cloud initiatives. http://www.infotech.com/research/it-enabling-corporate-personal-clouds

Infrastructure: Data Center & Facilities Optimization

Type	Document	Description
Blueprint: Develop a Global Network Strategy		
	Develop a Global Network Strategy	IT leaders must create a strategy and assess the options presented when bringing the global network infrastructure into a working state. http://www.infotech.com/research/it-develop-a-global-network-strategy
	Storyboard: Develop a Global Network Strategy	North American organizations managing a global WAN for the first time are presented with strategic decisions and options never experienced before. Bringing a global network infrastructure into a working state is different than deploying a WAN within the same province or state. http://www.infotech.com/research/it-storyboard-develop-a-global-network-strategy
	Global Network Requirements Workbook	One of the first steps in preparing for global network deployment is to gather a list of all inventories. A comprehensive inventory of applications and infrastructure at all global facilities is essential to determining what needs to be upgraded, changed, or moved. http://www.infotech.com/research/it-global-network-requirements-workbook
	Global Network Management Model Assessment Tool	A complete assessment and evaluation of all management model options should be conducted before deploying the global network to ensure it is done right the first time. Examine in-house, and hosted options to determine the best fit for the enterprise. http://www.infotech.com/research/it-global-network-management-model-assessment-tool

Blueprint: Develop a Standby Power Strategy		
	Develop a Standby Power Strategy	Many IT departments overlook best practices for standby power assessment and procurement, mistaking this critical infrastructure for a commodity-like purchase. http://www.infotech.com/research/it-develop-a-standby-power-strategy
	Storyboard: Develop a Standby Power Strategy	A standby power strategy that is scalable in design and includes routine maintenance will reduce costs and ensure capacity to meet future needs. http://www.infotech.com/research/it-storyboard-develop-a-standby-power-strategy
	Data Center Standby Power Requirements Calculator	Understanding the enterprises critical environment is the first step to right-sizing standby power equipment. Gather current and future requirements for all critical data center components to optimize the standby power solution and reduce downtime. http://www.infotech.com/research/data-center-standby-power-supply-requirements-calculator
	UPS RFP Template	Enterprises looking at potential vendors as part of their uninterruptible power supply (UPS) selection process may want to issue a request for proposal (RFP) once they establish their selection criteria. http://www.infotech.com/research/it-ups-rfp-template
	Standby Power Maintenance Checklist	Organizations must conduct routine maintenance and monitoring of UPS systems and generators in order to sustain and extend their useful life, and to avoid unnecessary costly replacements before they are due. http://www.infotech.com/research/standby-power-maintenance-checklist
Blueprint: Future-Proof the Data Center		
	Future-Proof the Data Center	The data center of the future might not have four walls and raised floors, but that doesn't mean that IT is out of the data center business just yet. Embrace change in the data center, conservatively. http://www.infotech.com/research/future-proof-the-data-center
	Storyboard: Future-Proof the Data Center	The data center of the future might not have four walls and raised floors, but that doesn't mean that IT is out of the data center business just yet. Embrace change in the data center, conservatively. http://www.infotech.com/research/it-storyboard-future-proof-the-data-center
	Data Center Roadmap Assessment Tool	Assess new technologies, processes, or people changes to see if they are mature and appropriate for your data center. http://www.infotech.com/research/data-center-roadmap-assessment-tool
Blueprint: Improve Data Center Energy Efficiency		
	Improve Data Center Energy Efficiency	Organizations that use efficiency metrics to monitor, measure, and manage data center efficiency are more successful in lower operating expenses in the data center over time. Use this storyboard to develop a strategy, choose metrics, set targets, and identify areas of improvement for data center efficiency. http://www.infotech.com/research/improve-data-center-energy-efficiency
	Storyboard: Improve Data Center Energy Efficiency	Organizations that use efficiency metrics to monitor, measure, and manage data center efficiency are more successful in lower operating expenses in the data center over time. http://www.infotech.com/research/it-storyboard-improve-data-center-energy-efficiency

Blueprint: Integrate Global Data Center Facilities		
	Integrate Global Data Center Facilities	IT leaders in North American organizations suddenly charged with managing data center facilities in other countries are faced with the challenge of normalizing structure, staffing, process, and procedures on a global scale. Most IT leaders have limited knowledge in managing global data centers, thus deciding what to tackle first can be an overwhelming experience. http://www.infotech.com/research/it-integrate-global-data-center-facilities
	Storyboard: Integrate Global Data Center Facilities	Many North American organizations inherit a global data center facility due to a merger or acquisition, greenfield expansion, or an upgrade to an existing facility in another country. Deciding what to tackle first can be an overwhelming experience for a new global IT leader. http://www.infotech.com/research/it-storyboard-integrate-global-data-center-facilities
	Global Data Center Integration Data Collection Workbook	One of the first steps in preparing for global data center integration is to gather a list of all inventories. A comprehensive inventory of applications and infrastructure at all global data centers is essential to determining what needs to be integrated, where there is a gap, or where redundancies are apparent. http://www.infotech.com/research/it-global-data-center-integration-data-collection-workbook
	Global Data Center Facilities Project Prioritization Tool	Regardless of how the global data center was acquired, data center integration is a large and complex project that requires a prioritized step-by-step plan that includes resourcing and budget analysis. http://www.infotech.com/research/it-global-data-center-facilities-project-prioritization-tool
	Communications Plan Template for a New Global Data Center Transition	Managing a new global data center can be an overwhelming task. Focusing on communicating effectively with new foreign staff is necessary for a successful integration and global team. http://www.infotech.com/research/it-communications-plan-template-for-a-new-global-data-center-transition
Blueprint: Move a Data Center		
	Move a Data Center	IT managers may only face a data center move once or twice in their professional lives, and therefore may have little knowledge of how to approach the project. http://www.infotech.com/research/consolidate-data-centers
	Storyboard: Move a Data Center	A data center relocation can be best described as a controlled disaster that involves high risk and requires rigorous and thorough planning. Over 29% of IT professionals have never been involved in any aspect of a data center move. Get started on the data center move initiative by understanding the process including the initial planning phases, discovery, execution, and project closure. http://www.infotech.com/research/storyboard-move-a-data-center
	Data Center Relocation Budget Tool	A data center move has numerous one-time and ongoing expenses spanning a range of areas and project phases. It is important to develop an accurate budget up front so that expectations regarding the timeline of these costs throughout the project can be budgeted for in advance. http://www.infotech.com/research/data-center-relocation-budget-tool
	Data Center Relocation Project Planning and Monitoring Tool	A data center relocation project is a risky endeavor that requires rigorous planning and attention to detail. Practicing good project management processes and understanding the tasks involved for planning the relocation will keep the team on schedule for the move execution date. http://www.infotech.com/research/data-center-relocation-project-planning-and-monitoring-tool

	Data Center Relocation Data Collection and Bundling Workbook	When moving the data center, developing a detailed inventory and orchestrating bundling and moving of related data center assets is a detailed process with many interconnected components and processes. This comprehensive discovery tool will walk you through the entire discovery process, from establishing a data collection plan to creating a move strategy. http://www.infotech.com/research/data-center-relocation-data-collection-and-bundling-workbook
	Data Center Relocation Services Provider SOW Scorecard	Statements of Work (SOW) from data center relocation services providers can be very difficult to differentiate because of considerable overlap in key content. This scorecard provides a common scoring method to evaluate vendor services and facilitate selection of the best relocation vendor to help move your organization's data center. http://www.infotech.com/research/data-center-relocation-services-provider-sow-scorecard
	Data Center Moving Day Project Planning & Monitoring Tool	The data center relocation move day event requires thorough planning and coordination. A minute-to-minute plan of tasks ensures the move team is prepared for the event. Prepare a structured plan for the day of the move to keep the team on time and on target. http://www.infotech.com/research/data-center-moving-day-project-planning-monitoring-tool
	Data Center Relocation Quality Assurance Project Planning and Monitoring Tool	The QA team plays a critical role on the day of the data center move to ensure all systems are up and running after the move has taken place. Establish test cases, scripts, and a minute-to-minute testing plan before the day of the move to ensure the QA team is prepared. http://www.infotech.com/research/data-center-relocation-quality-assurance-project-planning-and-monitoring-tool
	Data Center Relocation Project Wrap-up Checklist	Relocating the Data Center is a large undertaking that involves a great deal of old and new equipment. Decommissioning the old data center facility ensures that all remaining assets are accounted for and that proper steps have been taken to protect data and dispose of equipment appropriately. http://www.infotech.com/research/data-center-relocation-project-wrap-up-checklist
	Data Center Move Issue Resolution and Change Order Template	Whether the data center relocation project requires one weekend or multiple move dates to complete, it is important to collect and document all issues, resolutions, and changes experienced throughout the process to learn from and improve upon in future projects. Use this template to record the lessons learned and change requests throughout the project. http://www.infotech.com/research/data-center-move-issue-resolution-and-change-order-template
	Data Center Relocation Project Charter Template	A data center relocation project charter is essential to the planning phase of the project to identify scope and hit the ground running. It lays out important information along with real world examples, such as the project description, key success factors, potential risks, stakeholders, communications plan and decision rights. Complete the charter before the project commences. http://www.infotech.com/research/data-center-relocation-project-charter-template

▶	Data Center Relocation Tabletop Planning Video	A data center move requires minute-to-minute planning as well as complex logistics and communication. A table top planning exercise is a dress rehearsal for the move that will help to identify holes in the plan, clearly define roles and expectations, and help everyone involved to prepare courses of action for potential threats. http://www.infotech.com/research/data-center-relocation-tabletop-planning-video
Blueprint: Renovate the Data Center		
	Renovate the Data Center	This solution set will provide you with step-by-step design, planning and selection tools in order to define a data center renovation plan to reduce cost and risk while supporting cost-effective long-term growth. http://www.infotech.com/research/renovate-the-data-center
Blueprint: Build a Data Center		
	Build a Data Center	42% of IT leaders have been tasked with completing a data center build-out in 2010. Often, the organization lacks previous experience building a data center. http://www.infotech.com/research/build-a-data-center
	Estimate Data Center Power Requirements for Stable Long-Term Outlook	Estimating the required electrical service to power the data center is essential in data center planning and design. Estimating critical loads, cooling, and UPS requirements calls for an understanding of current and future business needs. Follow Info-Tech's method to assess data center power needs and ensure proper support and availability are included in the budget. http://www.infotech.com/research/estimate-data-center-power-requirements-for-stable-long-term-outlook
	IT Relocation Budget Worksheet	Small enterprises relocating IT assets will want to plan the moving budget. Relocation expense calculations should include factors ranging from site preparation costs to physical relocation costs. Use this tool to compute IT relocation expenditure. http://www.infotech.com/research/it-relocation-budget-worksheet
	Third-Party Access Request Form	Use Info-Tech's third-party access request form template to help you keep track of who has access to your valuable resources. http://www.infotech.com/research/third-party-access-request-form
	Data Center Renovation Contractor Scripted Interview	Data center facilities call for specific industrial design and engineering requirements to meet needs for fire-protection, power provisioning, stand-by power, cooling, physical security, and layout. Therefore, selecting a contractor is one of the most important first steps in a data center renovation project. When meeting with the potential contractor, use a scripted interview process to aid in the decision making process. http://www.infotech.com/research/data-center-renovation-contractor-scripted-interview
	Data Center Contractor Scripted Interview Scorecard	When meeting with potential contractors for the build of a new data center, organizations should use a scripted interview to aid in the decision making process. Each contractor should be scored based on a standard scoring method to ensure accuracy and fairness. Use this scorecard during the scripted interview process to keep track of interviews as they occur. http://www.infotech.com/research/data-center-contractor-scripted-interview-scorecard

	Data Center Standby Power Requirements Calculator	Understanding the enterprises critical environment is the first step to right-sizing standby power equipment. Gather current and future requirements for all critical data center components to optimize the standby power solution and reduce downtime. http://www.infotech.com/research/data-center-standby-power-supply-requirements-calculator
	Data Center Cooling Requirements Calculator	Estimating the data center's cooling load requirements can be a difficult task. Total heat output from all devices and other variables must be taken into account. Calculate current and future cooling requirements for the data center to ensure the necessary number of cooling devices are included in the budgeting process for the data center renovation project. http://www.infotech.com/research/data-center-renovation-contractor-scripted-interview
	Data Center Renovation Contractor Scripted Interview	Data center facilities call for specific industrial design and engineering requirements to meet needs for fire-protection, power provisioning, stand-by power, cooling, physical security, and layout. Therefore, selecting a contractor is one of the most important first steps in a data center renovation project. When meeting with the potential contractor, use a scripted interview process to aid in the decision making process. http://www.infotech.com/research/data-center-renovation-contractor-scripted-interview
	Data Center Renovation Contractor Reference Checklist	Data center renovation projects can lead to unexpected complexity and require the assistance of mechanical engineers or contractors in planning and implementation stages. Selecting the right contractor for the project should be based criteria determined by the business. After a shortlist of contractors have been determined, perform due diligence by conducting thorough reference checks. http://www.infotech.com/research/data-center-contractor-reference-checklist
Blueprint: Take a Strategic Approach to Maximize the Benefits of Green IT		
	Take a Strategic Approach to Maximize the Benefits of Green IT	Organizations are looking for creative strategies to cut costs and be more efficient as IT budgets shrink, and have not fully leveraged the potential of Green IT to meet both needs. http://www.infotech.com/research/it-take-a-strategic-approach-to-maximize-the-benefits-of-green-it
	Storyboard: Take a Strategic Approach to Maximize the Benefits of Green IT	Organizations that define clear environmental goals and measure energy usage have both the leadership and data required to make a strong business case for Green IT initiatives. http://www.infotech.com/research/it-storyboard-take-a-strategic-approach-to-maximize-the-benefits-of-green-it
	Energy & Carbon Calculator and Tracking Tool	Energy measurement provides hard data on how IT energy costs impact the bottom line, which fuels the business case for exploring Green IT initiatives. Energy measurement also provides the data necessary to make strategic business decisions. You can't manage what you don't measure. http://www.infotech.com/research/it-energy-carbon-calculator-and-tracking-tool

	Sustainability Annual Review Template	An annual sustainability review is an effective mechanism for communicating organizational goals, gaining staff buy-in, and driving continual improvement. Organizations that are most successful with their Green IT initiatives treat sustainability as an ongoing exercise rather than a project that starts and stops. http://www.infotech.com/research/it-sustainability-annual-review-template
	Successful Implementation of Green IT	With this solution set, Info-Tech takes a look at the impact of the energy crisis and global recession on Green IT, what we can learn from these events, and how to maximize the benefits of Green IT today. http://www.infotech.com/research/it-successful-implementation-of-green-it

Infrastructure: Outsourcing & Co-Location

Type	Document	Description
Blueprint: Terminate the IT Infrastructure Outsourcing Relationship		
	Terminate the IT Infrastructure Outsourcing Relationship	Moving your IT infrastructure can be a tricky process, especially with critical infrastructure and high exit costs. Work through this project to help you develop a plan to rehabilitate your existing relationship or move your IT infrastructure in a cost-effective and low-risk way. http://www.infotech.com/research/terminate-the-it-infrastructure-outsourcing-relationship
	Storyboard: Terminate the IT Infrastructure Outsourcing Relationship	This blueprint will guide you through the process of determining whether you should terminate your outsourcing agreement, developing an action plan, and executing the move. http://www.infotech.com/research/storyboard-terminate-the-it-infrastructure-outsourcing-relationship
	Terminate the Outsourcing Agreement Business Case Summary	Use this template to make the case for terminating your current IT infrastructure outsourcing agreement in a presentable format for stakeholders. http://www.infotech.com/research/terminate-the-outsourcing-agreement-business-case-summary
	Terminate the Outsourcing Agreement Detailed Business Case	Use this template to make the case for terminating your current IT infrastructure outsourcing agreement and define project scope and responsibilities to structure the project. http://www.infotech.com/research/terminate-the-outsourcing-agreement-detailed-business-case
	Data Center Relocation Project Planning and Monitoring Tool	A data center relocation project is a risky endeavor that requires rigorous planning and attention to detail. Practicing good project management processes and understanding the tasks involved for planning the relocation will keep the team on schedule for the move execution date. http://www.infotech.com/research/data-center-relocation-project-planning-and-monitoring-tool
Blueprint: Develop a Co-location Strategy		
	Develop a Co-location Strategy	Organizations that encounter significant capital expenditures, when building or updating their aging data center facilities. As a result, they are faced with a difficult build vs. buy decision. http://www.infotech.com/research/develop-a-co-location-strategy

Type	Document	Description
	Storyboard: Develop a Co-location Strategy	The decision to co-locate all or part of the data center facility can be a risky one. Because the decision to build vs. buy is essentially one of cost, IT decision makers must put in the time and effort in requirements gathering, determining the needs of the business, and selecting a co-location vendor to ensure the engagement is successful. http://www.infotech.com/research/storyboard-develop-a-co-location-strategy
	Data Center Facility Build vs. Buy Tool	The data center build versus buy decision is essentially a cost decision. Many organizations that gather requirements and forecast data center costs into the future will find that over time, a co-location strategy is the less expensive alternative. Evaluate the build versus buy costs to determine the best option for the organization. http://www.infotech.com/research/data-center-facility-build-vs-buy-tool
	Data Center Power and Cooling Requirements Calculator	Including both current and future facility requirements helps to align costs and capacity with enterprise needs. Calculate power, cooling, and standby power requirements to ensure an accurate budget and avoid cost overruns in the data center. http://www.infotech.com/research/data-center-power-and-cooling-requirements-calculator
	Data Center Co-location Proposal Scorecard	When the organization has received completed proposals back from co-location vendors, a common scoring method should be used to compare and evaluate each proposal. Implement a common scoring method into evaluation processes to determine a shortlist of vendors for the next stage of evaluation. http://www.infotech.com/research/data-center-co-location-proposal-scorecard
	Data Center Co-location Annual Contract Assessment Checklist	Ongoing management of the Service Level Agreement (SLA) and co-location contract is critical for a successful co-location engagement. Assessments should be conducted at least annually to ensure the co-location vendor is complying with the agreement. Review and manage co-location vendor performance annually to ensure ongoing success. http://www.infotech.com/research/data-center-co-location-annual-contract-assessment-checklist
	Data Center Co-location SLA & Service Definition Template	A co-location Service Level Agreement (SLA) provides a definition of performance for the negotiated service. SLAs ensure accountability on the part of the service provider and also determine the price of the service. Understand and develop expectations on co-location vendor SLAs using a real world example and template. http://www.infotech.com/research/data-center-co-location-sla-service-definition-template
	Co-location Engagement Vendor Selection Criteria Checklist	After defining the organization's requirements for data center co-location service offerings, expectations for the engagement methodology should be defined. Many organizations run into trouble in the co-location agreement when a vendor's business practices and processes do not reflect that of their own. Align business practice expectations with selection criteria to aid in the co-location vendor selection process. http://www.infotech.com/research/co-location-engagement-vendor-selection-criteria-checklist

Type	Document	Description
	Data Center Co-location Site Visit and Evaluation Checklist	Vendor co-location site visits can validate decisions or uncover vendor inadequacies and biases. Conduct site visits to shortlisted data center co-location vendors to add another layer of due diligence to the final vendor selection. http://www.infotech.com/research/data-center-co-location-site-visit-and-evaluation-checklist
	Data Center Co-location RFP Template	Organizations in the selection process for a co-location vendor should issue an RFP to gather required information from vendors and make an informed decision. After finalizing selection criteria that is relevant to the organization's needs, use this RFP template to narrow the search for a co-location vendor. http://www.infotech.com/research/data-center-co-location-rfp-template
	Data Center Power and Cooling Requirements Calculator	Including both current and future facility requirements helps to align costs and capacity with enterprise needs. Calculate power, cooling, and standby power requirements to ensure an accurate budget and avoid cost overruns in the data center. http://www.infotech.com/research/data-center-power-and-cooling-requirements-calculator
Blueprint: Cloud Strategy		
	Cloud Strategy	Our Cloud Strategy Research is designed to enable you to make yourself World Class by: breaking down Cloud Strategy into digestible steps, providing actionable instructions to complete each step and providing all the tools and templates you need. http://www.infotech.com/research/cloud-strategy
Vendor Landscape: US Co-location/Managed Services		
	Vendor Landscape: US Co-location/Managed Services	This vendor landscape looks at the US co-location/managed services market in order to provide recommendations on which vendors are most suitable for your organization's needs. http://www.infotech.com/research/it-vendor-landscape-american-co-location-providers
	Vendor Landscape Storyboard: US Co-location/Managed Services	The US co-location/managed services market has over 430 vendors providing similar offerings. Create a shortlist of vendors that suit the organization's need using Info-Tech's vendor landscape. http://www.infotech.com/research/it-vendor-landscape-storyboard-us-co-locationmanaged-services
	US Co-location/Managed Services Vendor Shortlist Tool	Identify leading candidates in the US Co-location/Managed Services market using Info-Tech's Vendor Shortlist Tool to generate a customized shortlist of vendors based on your key priorities. http://www.infotech.com/research/it-us-co-locationmanaged-services-vendor-shortlist-tool
	Contract Negotiation Strategy Tool	The ability to negotiate a reduced price with vendors is a crucial skill for IT professionals, who are often under pressure to reduce costs. There are a number of strategies that IT can use when negotiating for a reduced price on an IT contract. However, not all strategies are created equal and not all strategies should be used in every negotiation situation. Use this tool to help choose which negotiation strategies to use based on the organization's particular situation. http://www.infotech.com/research/contract-negotiation-strategy-tool

Type	Document	Description
	Cloud Strategy Case Study of a State Department Federal Credit Union	Since 1935, State Department Federal Credit Union (SDFCU) remains committed to serving its 68,000+ members worldwide. SDFCU needed IT to provide value-added services for members, which was perceived as a marketing differentiator in a competitive market. Aging infrastructure and end-of-life applications also needed to be updated. A cloud strategy was required to provide flexibility and scalability, while mitigating additional risks. http://www.infotech.com/research/it-cloud-strategy-case-study-of-a-state-department-federal-credit-union
	Cloud Strategy Case Study of a Large Food Producer	The current IT team of an international food producer provided IT services to all sister companies in North American, and was stretched for resources and time. An organizational mandate to keep costs flat drove IT to seek new ways to manage costs and improve services. Various business units were operating different solutions, causing challenges with support and integration. Info-Tech was engaged for a one-week workshop to help create a cloud strategy. http://www.infotech.com/research/it-cloud-strategy-case-study-of-a-large-food-producer
Blueprint: Outsource IT Infrastructure to Improve System Availability, Reliability, and Recovery		
	Outsource IT Infrastructure to Improve System Availability, Reliability, and Recovery	IT infrastructure outsourcing has become commonplace. Success requires careful planning and diligent execution. http://www.infotech.com/research/outsource-it-infrastructure-to-improve-system-availability-reliability-and-recovery
	Storyboard: Outsource IT Infrastructure to Improve System Availability, Reliability, and Recovery	The question is no longer about whether to outsource, but when to outsource. Use this blueprint to help you plan and execute your outsourcing journey and avoid common mistakes and pitfalls. http://www.infotech.com/research/storyboard-outsource-it-infrastructure-to-improve-system-availability-reliability-and-recovery
	Cloud Readiness and Service Value Workbook	Complete the cloud workbook to help you identify those areas where you are already well positioned to move to the cloud and those areas where work needs to be done. http://www.infotech.com/research/cloud-readiness-and-service-value-workbook
	Infrastructure Outsourcing Business Impact Analysis Tool	Don't be afraid to outsource your infrastructure supporting critical applications. Use this tool to map your critical applications and decide which infrastructure components to outsource. http://www.infotech.com/research/infrastructure-outsourcing-business-impact-analysis-tool
	In-House IT Infrastructure Costing Tool	Use this tool to help you determine the costs of running your IT infrastructure in-house. http://www.infotech.com/research/in-house-it-infrastructure-costing-tool
	Infrastructure Outsourcing RFP Scoring Tool	Use Info-Tech's Infrastructure Outsourcing RFP Scoring Tool to help you understand which vendors can best meet your requirements. http://www.infotech.com/research/infrastructure-outsourcing-rfp-scoring-tool
	IT Infrastructure Outsourcing Business Case Template	Use this template to help you build a business case to outsource your IT infrastructure. http://www.infotech.com/research/it-infrastructure-outsourcing-business-case-template

Type	Document	Description
	Infrastructure Outsourcing Request for Proposal Template	Use Info-Tech's Infrastructure Outsourcing Request for Proposal Template to narrow down the search for an outsourcing provider. http://www.infotech.com/research/infrastructure-outsourcing-request-for-proposal-template
	Data Center Co-location SLA & Service Definition Template	A co-location Service Level Agreement (SLA) provides a definition of performance for the negotiated service. SLAs ensure accountability on the part of the service provider and also determine the price of the service. Understand and develop expectations on co-location vendor SLAs using a real world example and template. http://www.infotech.com/research/data-center-co-location-sla-service-definition-template
	Server Room Co-location Site Visit & Evaluation Checklist	Organizations that have determined a shortlist of co-location vendors (likely after the RFP process) should conduct additional due diligence before making the final decision. Vendor co-location site visits can validate decisions or uncover vendor inadequacies and bias. Use a co-location site visit checklist to ensure that nothing is missed. http://www.infotech.com/research/server-room-co-location-site-visit--evaluation-checklist
	Data Center Co-location Site Visit and Evaluation Checklist	Vendor co-location site visits can validate decisions or uncover vendor inadequacies and biases. Conduct site visits to shortlisted data center co-location vendors to add another layer of due diligence to the final vendor selection. http://www.infotech.com/research/data-center-co-location-site-visit-and-evaluation-checklist
Blueprint: Recover Data Center Space After IT Infrastructure Outsourcing		
	Recover Data Center Space After IT Infrastructure Outsourcing	The growth of IT infrastructure outsourcing and server virtualization have reduced in-house data center physical space and equipment requirements, leaving organizations with more data center capacity than they need. Stop wasting resources by maintaining this extra capacity and downsize your data center if you don't need the space. http://www.infotech.com/research/recover-data-center-space-after-it-infrastructure-outsourcing
	Storyboard: Recover Data Center Space After IT Infrastructure Outsourcing	Get rid of your extra in-house data center space and equipment before you destroy your outsourcing business case. http://www.infotech.com/research/storyboard-recover-data-center-space-after-it-infrastructure-outsourcing
	Data Center Downsizing Requirements Calculation Tool	Use the Data Center Downsizing Requirements Calculation Tool to right-size your in-house data center and equipment after outsourcing IT infrastructure to meet current and future needs. http://www.infotech.com/research/data-center-downsizing-requirements-calculation-tool
	Data Center Recovery Action Plan and Project Monitoring Tool	Use the Data Center Recovery Action Plan and Project Monitoring Tool to organize your project initiatives and track project progress. http://www.infotech.com/research/data-center-recovery-action-plan-and-project-monitoring-tool
	Data Center Recovery Business Case Summary	Use the Data Center Recovery Business Case Summary to summarize your case for re-purposing unused space in the data center for senior management. http://www.infotech.com/research/data-center-recovery-business-case-summary

Type	Document	Description
	Detailed Data Center Recovery Business Case	Use the Detailed Data Center Recovery Business Case to help you communicate your case for re-purposing unused space in the data center. http://www.infotech.com/research/detailed-data-center-recovery-business-case
Additional Resources		
	What are considerations needed to effectively leverage DRP outsourcing services?	This FAQ will help you define the drivers and criteria required to make DRP outsourcing work for your organization. http://www.infotech.com/research/what-are-considerations-needed-to-effectively-leverage-drp-outsourcing-services
	Data Center Facility Requirements Estimations At-a-Glance	When building or refreshing the data center, IT must have a high level understanding of requirements and potential budget. Facility requirements for power, cooling, standby power, fire protection, sizing, and architectural space layout should be estimated before entertaining a build versus buy decision, as well as providing decision makers with a 360-degree view of requirements and costs. Use Info-Tech's research to aid in the facility requirements gathering process and strategy. http://www.infotech.com/research/data-center-facility-requirements-estimations-at-a-glance
	Data Center Facility Requirements Estimations At-a-Glance	When building or refreshing the data center, IT must have a high level understanding of requirements and potential budget. Facility requirements for power, cooling, standby power, fire protection, sizing, and architectural space layout should be estimated before entertaining a build versus buy decision, as well as providing decision makers with a 360-degree view of requirements and costs. Use Info-Tech's research to aid in the facility requirements gathering process and strategy. http://www.infotech.com/research/data-center-facility-requirements-estimations-at-a-glance
	Data Center Facility Requirements Estimations At-a-Glance	When building or refreshing the data center, IT must have a high level understanding of requirements and potential budget. Facility requirements for power, cooling, standby power, fire protection, sizing, and architectural space layout should be estimated before entertaining a build versus buy decision, as well as providing decision makers with a 360-degree view of requirements and costs. Use Info-Tech's research to aid in the facility requirements gathering process and strategy. http://www.infotech.com/research/data-center-facility-requirements-estimations-at-a-glance

Infrastructure: Server Optimization

Type	Document	Description
Blueprint: Assess the Appropriateness of the iSeries/IBM i in My Business		
	Assess the Appropriateness of the iSeries/IBM i in My Business	The perception that IBM Power Systems (e.g. iSeries, IBM i) is a dying platform built on old technology is applying pressure on IT leaders to determine the future viability of this platform, and whether it's still the right fit for their organization. http://www.infotech.com/research/it-assess-the-appropriateness-of-the-iseriesibm-i-in-my-business
	Storyboard: Assess the Appropriateness of the iSeries/IBM i in My Business	Many organizations are apprehensive about the IBM Power Systems (e.g. iSeries, IBM i), due to a perception that this is a dying platform built on old technology. While there is some angst about the platform, most perceived challenges are more myth than reality. http://www.infotech.com/research/it-storyboard-assess-the-appropriateness-of-the-iseriesibm-i-in-my-business
	Power Systems TCO Comparison Tool	IT departments running IBM Power Systems often face pressure from the executive team to migrate to what is perceived to be a cheaper solution, such as commodity x86 servers. Use this tool to determine the TCO so you can make an accurate cost comparison. http://www.infotech.com/research/power-systems-tco-comparison-tool
	Separating iSeries/IBM i Myths from Reality	Perceptions that IBM Power Systems (e.g. iSeries, IBM i) are an old technology and a dying platform have proven to be more myth than reality. http://www.infotech.com/research/it-separating-iseriesibm-i-myths-from-reality
Blueprint: Bridge the Gap between Service Management & Disaster Recovery		
	Bridge the Gap between Service Management & Disaster Recovery	If a tornado destroys your data center, that's an obvious DR scenario. However, the vast majority of extended service interruptions are caused by relatively minor events, such as hardware issues, isolated power or network outages, and so on, that typically fall initially under service management procedures. http://www.infotech.com/research/it-bridge-the-gap-between-service-management-disaster-recovery
	Storyboard: Bridge the Gap between Service Management and Disaster Recovery	DRPs often focus on major events and don't adequately address less dramatic causes of service interruptions. Incorporate DR scenarios and timelines into service management procedures to bridge that gap. http://www.infotech.com/research/storyboard-bridge-the-gap-between-service-management-and-disaster-recovery
	Business Impact Analysis Workbook	Perform a business impact analysis and risk assessment, and set recovery point objectives (RPO) and recovery time objectives (RTO). http://www.infotech.com/research/it-business-impact-analysis-workbook
	Severity Definitions and Disaster Recovery Timeline Template	This template provides a framework for updating severity definitions to account for DR scenarios and meet DR timeline requirements. http://www.infotech.com/research/it-severity-definitions-and-disaster-recovery-timeline-template
	Extending Service Management to Account for Disaster Recovery Scenarios	Set strict timelines and criteria for escalating from service management to DRP. Organizations that treat DR as an extension of service management have fewer extended downtime incidents. http://www.infotech.com/research/extending-service-management-to-account-for-disaster-recovery-scenarios

Build a Case for Windows Server 2012 Hyper-V		
	Build a Case for Windows Server 2012 Hyper-V	VMware continues to hold a dominant first place in server virtualization, but Microsoft is a growing second place contender and the main alternative to VMware for virtualization. Microsoft Hyper-V has improved enormously since its introduction and has largely caught up with VMware across most feature and function categories. Is it right for you? http://www.infotech.com/research/build-a-case-for-windows-server-2012-hyper-v
	Storyboard: Build a Case for Windows Server 2012 Hyper-V	Hyper-V is a credible alternative and competitive threat to VMware for virtualization and hybrid cloud computing. Be prepared to make the case to properly evaluate this option. http://www.infotech.com/research/storyboard-build-a-case-for-windows-server-2012-hyper-v
	System Center Virtual Server Management TCO Tool	Compare current and prospective licensing costs for VMware vCenter/vCloud and Hyper-V System Center. Build a System Center Licensing TCO. http://www.infotech.com/research/system-center-virtual-server-management-tco-tool
	Hyper-V Evaluation and Adoption Roadmap Building Tool	Use this tool to document the results of your Hyper-V project roadmapping exercise. The resulting “radar chart” output can be included in your documented case for Hyper-V evaluation and deployment. http://www.infotech.com/research/hyper-v-evaluation-and-adoption-roadmap-building-tool
	Server Virtualization Roadmap Development Tool	This assessment and roadmap development tool will help you create a roadmap for future development of a managed virtual infrastructure and internal cloud. http://www.infotech.com/research/it-server-virtualization-roadmap-development-tool
	Case Document for Evaluating Hyper-V	Pull all the good work you've now done on evaluating how Hyper-V might fit into your virtualization strategy into a summary case document. Include findings and go forward with plans for deeper evaluation and piloting of the Hyper-V options. http://www.infotech.com/research/case-document-for-evaluating-hyper-v
	Server Acquisition Business Plan	The typical trigger for acquiring servers is hardware refresh; however, getting the most value out of server purchases requires a strategic context. This business plan template puts the server acquisition in the context of a server consolidation strategy. Use it to justify not only the purchase but the size and configuration of the servers acquired. http://www.infotech.com/research/server-acquisition-business-plan
	Capacity Planning Data Collection & Tiering Workbook	Use this capacity tiering workbook to keep track of applications and infrastructure, and introduce tiers of service that deliver "good enough" performance for cost effective capacity management. http://www.infotech.com/research/it-capacity-planning-data-collection-tiering-workbook
Blueprint: Embrace the Cloud		
	Use Cloud Computing to Achieve Small Enterprise Savings	Cloud computing offers a compelling opportunity for small businesses to reduce IT costs. Cloud costs are orders of magnitude lower than the per unit costs of internally developed IT resources. http://www.infotech.com/research/use-cloud-computing-to-achieve-small-enterprise-savings

	Capacity Planning Data Collection & Tiering Workbook	Use this capacity tiering workbook to keep track of applications and infrastructure, and introduce tiers of service that deliver "good enough" performance for cost effective capacity management. http://www.infotech.com/research/it-capacity-planning-data-collection-tiering-workbook
	Virtualization Consolidation Cost Savings Calculator	Info-Tech Research Group has established that savings through lower one-time and ongoing server acquisition costs is the strongest argument in a business case for server virtualization. Use this calculator to get a broad sense of the consolidation savings of a virtual server deployment over provisioning servers with individual instances of server hardware. http://www.infotech.com/research/virtualization-consolidation-cost-savings-calculator
Blueprint: Get the Most out of Server Virtualization		
	Get the Most out of Server Virtualization	For many enterprises, server virtualization is moving beyond basic consolidation into a more managed virtual environment, and potentially to the internal Cloud. Understanding the benefits of each of these stages and their associated costs will assist you when setting your server virtualization goals. http://www.infotech.com/research/it-get-the-most-out-of-server-virtualization
	Storyboard: Get the Most out of Server Virtualization	Server virtualization has gone from hot emerging trend to a mainstream reality. As virtual infrastructure becomes core infrastructure, focus investment on getting the most benefit at the lowest total cost. http://www.infotech.com/research/it-storyboard-get-the-most-out-of-server-virtualization
	Server Virtualization Roadmap Development Tool	This assessment and roadmap development tool will help you create a roadmap for future development of a managed virtual infrastructure and internal cloud. http://www.infotech.com/research/it-server-virtualization-roadmap-development-tool
	Server Virtualization TCO Comparison Tool	This TCO tool provides organizations with a framework for estimating the costs associated with deploying a server virtualization solution relative to a server refresh, or an alternate vendor. http://www.infotech.com/research/it-server-virtualization-tco-comparison-tool
	Server Virtualization RFP Scoring Tool	For organizations that have issued a formal Request for Proposal (RFP) to evaluate server virtualization vendors, gathering and scoring the various responses can be difficult and time consuming. This tool enables enterprises to evaluate and compare the results of a server virtualization RFP process quickly and easily. http://www.infotech.com/research/server-virtualization-rfp-scoring-tool
	Virtualization Consolidation Cost Savings Calculator	Info-Tech Research Group has established that savings through lower one-time and ongoing server acquisition costs is the strongest argument in a business case for server virtualization. Use this calculator to get a broad sense of the consolidation savings of a virtual server deployment over provisioning servers with individual instances of server hardware. http://www.infotech.com/research/virtualization-consolidation-cost-savings-calculator
	Server Virtualization RFP Template	Use this template to help create a Request for Proposal (RFP) that lists a virtualization solution's features according to enterprise requirements. http://www.infotech.com/research/it-server-virtualization-rfp-template

	Server Virtualization Vendor Demo Script	Use this demonstration script to provide vendors with a consistent set of instructions, ensuring an objective comparison of product features. http://www.infotech.com/research/it-server-virtualization-vendor-demo-script
Blueprint: Go Agile		
	Leverage Server Virtualization for DR Affordability and Agility	Situation. For many organizations, particularly midsized enterprises, improved infrastructure availability and recovery is as big a driver for server virtualization as consolidation. http://www.infotech.com/research/leverage-server-virtualization-for-dr-affordability-and-agility
	Virtualization Consolidation Cost Savings Calculator	Info-Tech Research Group has established that savings through lower one-time and ongoing server acquisition costs is the strongest argument in a business case for server virtualization. Use this calculator to get a broad sense of the consolidation savings of a virtual server deployment over provisioning servers with individual instances of server hardware. http://www.infotech.com/research/virtualization-consolidation-cost-savings-calculator
Blueprint: Manage & Plan Capacity for the Internal Cloud		
	Manage & Plan Capacity for the Internal Cloud	Provisioning an app or service in a consolidated environment is less about acquiring and deploying technology than it is carving resources out of an existing pool of capacity. Server and storage consolidation breaks a neat 1-to-1 connection that has existed between solution delivery and the acquisition/deployment of physical IT assets. http://www.infotech.com/research/it-manage-consolidated-infrastructure-for-cost-service-transparency
	Storyboard: Manage & Plan Capacity for the Internal Cloud	An internal cloud requires capacity management to cost effectively match business requirements with infrastructure. Develop a capacity management plan that optimizes infrastructure as a service by inventorying current capacity while planning for the future. http://www.infotech.com/research/it-storyboard-manage-plan-capacity-for-the-internal-cloud
	Capacity Planning Data Collection & Tiering Workbook	Use this capacity tiering workbook to keep track of applications and infrastructure, and introduce tiers of service that deliver "good enough" performance for cost effective capacity management. http://www.infotech.com/research/it-capacity-planning-data-collection-tiering-workbook
	Capacity Management Process Checklist	Having an internal cloud strategy can control costs and improve efficiency of a consolidated infrastructure. Use this process checklist to track your organization's progress in developing your internal cloud. http://www.infotech.com/research/it-capacity-management-process-checklist
	Internal Cloud Business Plan Template	Having an internal cloud strategy can control costs and improve efficiency of a consolidated infrastructure. Use this business plan to demonstrate how ongoing capacity assessment and planning will help deliver service goals at the lowest possible cost. http://www.infotech.com/research/it-internal-cloud-business-plan-template
	Managing Capacity in a Consolidated Infrastructure	An internal cloud requires capacity management to cost effectively match business requirements with infrastructure. Develop a capacity management plan that optimizes infrastructure as a service by inventorying current capacity while planning for the future. http://www.infotech.com/research/it-managing-capacity-in-a-consolidated-infrastructure

Blueprint: Maximize Availability for Mission Critical Systems		
	Maximize Availability for Mission Critical Systems	Mission critical systems directly and significantly impact revenue, goodwill, health & safety, or regulatory compliance, and therefore demand a higher level of attention than non-critical production systems. http://www.infotech.com/research/it-maximize-availability-for-mission-critical-systems
	Storyboard: Maximize Availability for Mission Critical Systems	High availability is typically thought to be about technology, but downtime is most often a result of human error or inadequate processes to prevent or properly manage incidents. http://www.infotech.com/research/it-storyboard-maximize-availability-for-mission-critical-systems
	Mission Critical Systems and Dependencies Workbook	A mission critical environment is only as strong as its weakest link. Use this tool to ensure awareness of all dependencies and who to contact if something goes wrong. http://www.infotech.com/research/it-mission-critical-systems-and-dependencies-workbook
	High Availability is Not Just About Technology	Downtime is more likely to be caused by human error or process issues, yet organizations often focus primarily on technology redundancy. http://www.infotech.com/research/it-high-availability-is-not-just-about-technology
Blueprint: Maximize the Value of IBM Mainframes in My Business		
	Maximize the Value of IBM Mainframes in My Business	Organizations have had 25 years to get off mainframes. It's time to stop talking migration, embrace the benefits of this platform, and focus on improving cost-effectiveness. http://www.infotech.com/research/it-maximize-the-value-of-ibm-mainframes-in-my-business
	Storyboard: Maximize the Value of IBM Mainframes in My Business	Organizations have had 25 years to get off mainframes. It's time to stop talking migration, embrace the benefits of this platform, and focus on improving cost-effectiveness. http://www.infotech.com/research/it-storyboard-maximize-the-value-of-ibm-mainframes-in-my-business
	Mainframe TCO Comparison Tool	The high cost associated with a single mainframe creates the perception that mainframes are more expensive than alternative platforms, but you have to look at TCO to make an accurate comparison and fair evaluation of your mainframe's cost-effectiveness. http://www.infotech.com/research/it-mainframe-tco-comparison-tool
Vendor Landscape: Cloud Management		
	Vendor Landscape: Cloud Management	Cloud Management is a rapidly maturing and evolving market comprised of proprietary and open source vendors coming from varied backgrounds. Some solutions target the enterprise, and others aim at service providers, while some target both. http://www.infotech.com/research/it-vendor-landscape-cloud-management
Vendor Landscape: Application Delivery Controllers		
	Vendor Landscape: Application Delivery Controllers	As enterprises build larger client bases, the critical customer operations of web applications struggle to perform under the increased load. Put application delivery controllers (ADCs) in place to balance the load created by this increased activity and to provide the security that customers want. Use this Vendor Landscape to select the ideal ADC vendor. http://www.infotech.com/research/it-vendor-landscape-application-delivery-controllers

Blueprint: Build a Server Acquisition Strategy for the Internal Cloud		
	Build a Server Acquisition Strategy for the Internal Cloud	This solution set will provide strategy for building a consolidated server infrastructure that will balance maximum capacity and utilize efficiency while limiting costs. http://www.infotech.com/research/build-a-server-acquisition-strategy-for-the-internal-cloud
Blueprint: Build an Optimized Infrastructure-as-a-Service Internal Cloud		
	Build an Optimized Infrastructure-as-a-Service Internal Cloud	Take virtualization to the next level (internal cloud). Bring the management and resiliency of server virtualization to 80 to 100% of server workloads by building and managing appropriate compute, network, and storage capacity. http://www.infotech.com/research/beyond-consolidation-build-an-optimized-infrastructure-as-a-service-internal-cloud
Blueprint: Avoid Server Virtualization Implementation Pain		
	Avoid Server Virtualization Implementation Pain	Situation. Implementers generally report success in their virtualization projects. http://www.infotech.com/research/avoid-server-virtualization-implementation-pain
	Hot Developments in Infrastructure	Explosive data growth, cloud computing, virtualization and consolidation, mobile computing; these are all major technology trends that are having a large impact on IT departments today. For infrastructure professionals, these trends are top of mind right now because they are driving interest in a range of new developments that advocates say will impact future directions in infrastructure. http://www.infotech.com/research/it-hot-developments-in-infrastructure
	VMworld 2011: VMware Platform Is About the Whole Infrastructure	Three or four years ago keynotes and announcements at VMworld were all about cool server tricks. Today, as VMware seeks to be an infrastructure cloud platform, servers are just one layer in the infrastructure cake of the "virtual data center." http://www.infotech.com/research/it-vmworld-2011-vmware-platform-is-about-the-whole-infrastructure
Blueprint: Power the IaaS Cloud with a Cloud Management Solution		
	Power the IaaS Cloud with a Cloud Management Solution	Most compute clouds leverage consolidated, standardized, and virtualized infrastructure. These are important foundation pieces. But to offer a fully functional cloud, you need a Cloud Management Solution (CMS) to orchestrate all the services through management APIs, automate the provisioning and scaling of processes and services, and present services to end customers via a self-service portal. http://www.infotech.com/research/it-power-the-iaas-cloud-with-a-cloud-management-solution
	Storyboard: Power the IaaS Cloud with a Cloud Management Solution	Most compute Clouds leverage consolidated, standardized, and virtualized infrastructure. These are important foundation pieces. But to offer a fully functional Cloud, you need a cloud management solution. http://www.infotech.com/research/it-storyboard-power-the-iaas-cloud-with-a-cloud-management-solution
	Cloud Management Appropriateness Assessment Tool	All the buzz associated with cloud computing does not mean that every organization should rush in to build it for their organization. The Cloud is still a work in progress, and it's up to you to decide when you're ready for the final push. http://www.infotech.com/research/it-cloud-management-appropriateness-assessment-tool

	Cloud Management Strategy Position Template	IT departments are being asked to respond to interest (and sometimes direct pressure) in cloud computing. This strategy position template will help objectively define IT's position on the Cloud for the organization and set realistic expectations. http://www.infotech.com/research/it-cloud-management-strategy-position-template
Blueprint: Secure IBM i Systems to Meet Today's Risks		
	Secure IBM i Systems to Meet Today's Risks	IBM i is no longer isolated from threats. Modernization efforts have added web-based applications, integrations with other platforms, and exposure to modern-day security risks. http://www.infotech.com/research/it-secure-ibm-i-systems-to-meet-todays-risks
	Storyboard: Secure IBM i Systems to Meet Today's Risks	IBM i is no longer isolated from threats. Modernization efforts have added web-based applications, integrations with other platforms, and exposure to modern-day security risks. http://www.infotech.com/research/it-storyboard-secure-ibm-i-systems-to-meet-todays-risks
	Identify Potential Security Risks for IBM i Systems	This template is intended to facilitate security risk awareness. It is not a security assessment. Use the information gathered here to guide more detailed assessments and strategies to secure your IBM i system. http://www.infotech.com/research/it-identify-potential-security-risks-for-ibm-i-systems
	IBM i Network Security Checklist	The security practices from the AS/400 days aren't good enough anymore. Use Info-Tech's security checklists and templates to identify and address network, application, data, and user access security risks. http://www.infotech.com/research/it-ibm-i-network-security-checklist
	IBM i Data Security Checklist	The security practices from the AS/400 days aren't good enough anymore. Use Info-Tech's security checklists and templates to identify and address network, application, data, and user access security risks. http://www.infotech.com/research/it-ibm-i-data-security-checklist
	IBM i Data Center Access Policy	The security practices from the AS/400 days aren't good enough anymore. Use Info-Tech's security checklists and templates to identify and address network, application, data, and user access security risks. http://www.infotech.com/research/it-ibm-i-data-center-access-policy
	IBM i User Access Request Form	The security practices from the AS/400 days aren't good enough anymore. Use Info-Tech's security checklists and templates to identify and address network, application, data, and user access security risks. http://www.infotech.com/research/it-ibm-i-user-access-request-form
	IBM i User Access Security Checklist	The security practices from the AS/400 days aren't good enough anymore. Use Info-Tech's security checklists and templates to identify and address network, application, data, and user access security risks. http://www.infotech.com/research/it-ibm-i-user-access-security-checklist
	IBM i Audit Log Review Worksheet	The security practices from the AS/400 days aren't good enough anymore. Use Info-Tech's security checklists and templates to identify and address network, application, data, and user access security risks. http://www.infotech.com/research/it-ibm-i-audit-log-review-worksheet
	IBM i Security Audit Journal Checklist	The security practices from the AS/400 days aren't good enough anymore. Use Info-Tech's security checklists and templates to identify and address network, application, data, and user access security risks. http://www.infotech.com/research/it-ibm-i-security-audit-journal-checklist

Blueprint: Select a Blade Server Platform		
	Select a Blade Server Platform	Be sure that blades are really appropriate for enterprise server goals. Then decide which blade is best and which vendor's approach to consolidation and management is optimal. http://www.infotech.com/research/it-select-a-blade-server-platform
	Storyboard: Select the Right Blade Server Platform	Blades make effective building blocks for a consolidated server utility infrastructure. But first be sure that blades are really appropriate for your enterprise server goals. Then decide which blade system is best. http://www.infotech.com/research/it-storyboard-select-the-right-blade-server-platform
	Blade Server RFP Scoring Tool	For organizations that have issued a formal Request for Proposal (RFP) to evaluate Blade Server vendors, gathering and scoring the various responses can be difficult and time consuming. This tool enables enterprises to evaluate and compare the results of a Blade Server RFP process quickly and easily. http://www.infotech.com/research/it-blade-server-rfp-scoring-tool
	Blade Server Vendor RFP Template	Organizations embarking on the selection process for a blade server vendor may elect to issue a Request for Proposal (RFP) after determining their final selection criteria. http://www.infotech.com/research/it-blade-server-vendor-rfp-template
	Blade Server Seller Interrogation Script	In many cases, the engagement to acquire server blades is not with the original equipment manufacturer but with a sales channel partner. This script will give you questions to explore with a reseller to clarify the specific value add that the reseller brings to the engagement. Use this interview to help solidify your vendor choice. http://www.infotech.com/research/it-blade-server-seller-interrogation-script
	Select the Right Blade Server Platform	Blades make effective building blocks for a consolidated utility infrastructure. They are increasingly turned to for server consolidation, particularly where space, power consumption, and management resources are at a premium. This video answers some common questions about the blade server selection process. http://www.infotech.com/research/it-select-the-right-blade-server-platform
	Cloud Management Appropriateness Assessment Tool	All the buzz associated with cloud computing does not mean that every organization should rush in to build it for their organization. The Cloud is still a work in progress, and it's up to you to decide when you're ready for the final push. http://www.infotech.com/research/it-cloud-management-appropriateness-assessment-tool
	Cloud Management Strategy Position Template	IT departments are being asked to respond to interest (and sometimes direct pressure) in cloud computing. This strategy position template will help objectively define IT's position on the Cloud for the organization and set realistic expectations. http://www.infotech.com/research/it-cloud-management-strategy-position-template
	Blade Server RFP Scoring Tool	For organizations that have issued a formal Request for Proposal (RFP) to evaluate Blade Server vendors, gathering and scoring the various responses can be difficult and time consuming. This tool enables enterprises to evaluate and compare the results of a Blade Server RFP process quickly and easily. http://www.infotech.com/research/it-blade-server-rfp-scoring-tool

	Blade Server Vendor RFP Template	Organizations embarking on the selection process for a blade server vendor may elect to issue a Request for Proposal (RFP) after determining their final selection criteria. http://www.infotech.com/research/it-blade-server-vendor-rfp-template
	Blade Server Seller Interrogation Script	In many cases, the engagement to acquire server blades is not with the original equipment manufacturer but with a sales channel partner. This script will give you questions to explore with a reseller to clarify the specific value add that the reseller brings to the engagement. Use this interview to help solidify your vendor choice. http://www.infotech.com/research/it-blade-server-seller-interrogation-script
	Select the Right Blade Server Platform	Blades make effective building blocks for a consolidated utility infrastructure. They are increasingly turned to for server consolidation, particularly where space, power consumption, and management resources are at a premium. This video answers some common questions about the blade server selection process. http://www.infotech.com/research/it-select-the-right-blade-server-platform
	Server Virtualization TCO Comparison Tool	This TCO tool provides organizations with a framework for estimating the costs associated with deploying a server virtualization solution relative to a server refresh, or an alternate vendor. http://www.infotech.com/research/it-server-virtualization-tco-comparison-tool
	Server Virtualization RFP Scoring Tool	For organizations that have issued a formal Request for Proposal (RFP) to evaluate server virtualization vendors, gathering and scoring the various responses can be difficult and time consuming. This tool enables enterprises to evaluate and compare the results of a server virtualization RFP process quickly and easily. http://www.infotech.com/research/server-virtualization-rfp-scoring-tool
	Server Virtualization Vendor Shortlist Tool	Info-Tech conducted its own market evaluation of five leading server virtualization solutions. Before sitting down with vendors, use this tool to narrow the vendors to a shortlist of solutions that best satisfy the company's requirements. http://www.infotech.com/research/it-server-virtualization-vendor-shortlist-tool
	Virtualization Consolidation Cost Savings Calculator	Info-Tech Research Group has established that savings through lower one-time and ongoing server acquisition costs is the strongest argument in a business case for server virtualization. Use this calculator to get a broad sense of the consolidation savings of a virtual server deployment over provisioning servers with individual instances of server hardware. http://www.infotech.com/research/virtualization-consolidation-cost-savings-calculator
	Server Virtualization RFP Template	Use this template to help create a Request for Proposal (RFP) that lists a virtualization solution's features according to enterprise requirements. http://www.infotech.com/research/it-server-virtualization-rfp-template
	Server Virtualization Vendor Demo Script	Use this demonstration script to provide vendors with a consistent set of instructions, ensuring an objective comparison of product features. http://www.infotech.com/research/it-server-virtualization-vendor-demo-script

▶	Select a Server Virtualization Solution with Confidence	VMware continues to dominate, but selection isn't just about who is the leader. Competitors are providing legitimate alternatives for consolidation and virtual infrastructure management. http://www.infotech.com/research/it-select-a-server-virtualization-solution-with-confidence
Vendor Landscape: Blade Systems		
	Vendor Landscape Storyboard: Blade Systems	This vendor landscape looks at the blade system market in order to provide recommendations on which vendors are most suitable for your organization's server needs. http://www.infotech.com/research/vendor-landscape-storyboard-blade-systems
	Blade Systems Vendor Shortlist Tool	This tool allows enterprises to generate a customized shortlist of vendors based on required capabilities and future requirements for blade systems. http://www.infotech.com/research/blade-systems-vendor-shortlist-tool
Vendor Landscape: Application Delivery Controllers		
	Vendor Landscape Storyboard: Application Delivery Controllers	Application Delivery Controllers (ADCs) are becoming a necessity for most enterprises. Select an ADC solution to maintain server uptime and improve web application security. http://www.infotech.com/research/it-vendor-landscape-storyboard-application-delivery-controllers
	Application Delivery Controller Vendor Shortlist Tool	Use this tool to generate a customized shortlist of application delivery controller vendors based on your organization's preferred product features and vendor attributes. http://www.infotech.com/research/it-application-delivery-controller-vendor-shortlist-tool
Vendor Landscape: Cloud Infrastructure-as-a-Service		
	Vendor Landscape: Cloud Infrastructure-as-a-Service	Cloud Infrastructure-as-a-Service (IaaS) - the renting of compute - is the fastest growing delivery model of cloud computing. This Vendor Landscape examines the founding giants in the Cloud Infrastructure-as-a-Service (IaaS) field as well as the innovative emerging providers and their presence. http://www.infotech.com/research/select-the-right-cloud-infrastructure-server-partner
	Vendor Landscape Storyboard: Cloud Infrastructure-as-a-Service	Infrastructure-as-a-Service is seeing continued growth in adoption. Customers are being presented with more customizability while features themselves are increasing in breadth, giving the solution more functionality. http://www.infotech.com/research/it-vendor-landscape-storyboard-cloud-infrastructure-as-a-service
	Cloud Infrastructure-as-a-Service Vendor Shortlist Tool	Fifteen IaaS vendors, who vary from emerging players to established incumbents, have each been assessed on the basis of their offering's capabilities and organization's strengths. Use this tool to create a shortlist of these vendors, ranking them in accordance to your wants and needs. http://www.infotech.com/research/cloud-infrastructure-as-a-service-vendor-shortlist-tool
	Cloud Management Platform Vendor Shortlist and Feature Analysis Tool	This tool allows enterprises to profile their cloud management requirements and generate a rank-ordered vendor shortlist from a fixed list of vendors. http://www.infotech.com/research/cloud-management-platform-vendor-shortlist-and-feature-analysis-tool
	Cloud Management Platform RFP Template	Use this template to help create a Request for Proposal (RFP) that lists a collaboration platform's features according to enterprise requirements. http://www.infotech.com/research/cloud-management-platform-rfp-template

	Cloud Management Platform Vendor Demo Script	Use this demonstration script to provide vendors with a consistent set of instructions, ensuring an objective comparison of product features. http://www.infotech.com/research/cloud-management-platform-vendor-demo-script
Vendor Landscape: Converged Systems		
	Vendor Landscape: Converged Systems	Converged systems take blade systems a step further by including a storage tier. Originally for large enterprises and service providers, these systems have moved downmarket to consolidate resources and increase operational flexibility. http://www.infotech.com/research/it-vendor-landscape-converged-systems
	Vendor Landscape Storyboard: Converged Systems	Converged systems take blade systems a step further by including a storage tier. Originally intended for large enterprises and service providers, these systems have moved downmarket as a means of consolidating resources and increasing operational flexibility. http://www.infotech.com/research/it-vendor-landscape-storyboard-converged-systems
	Converged Systems Vendor Shortlist Tool	Info-Tech conducted its own market evaluation of eight leading converged systems vendors. This tool allows enterprises to profile their converged systems requirements and generate a shortlist of vendors. http://www.infotech.com/research/it-converged-systems-vendor-shortlist-tool
Vendor Landscape: Server Virtualization		
	Vendor Landscape: Server Virtualization	Server virtualization continues to drive value in infrastructure consolidation and management while laying the foundation of private and public cloud computing. http://www.infotech.com/research/it-vendor-landscape-server-virtualization
	Vendor Landscape Storyboard: Server Virtualization	Server virtualization continues to expand in both function and use case. Select the solution that fits your server situation and provides the best user experience and TCO for your organization's needs. http://www.infotech.com/research/it-vendor-landscape-storyboard-server-virtualization
	Server Virtualization Vendor Shortlist & Detailed Feature Analysis Tool	Info-Tech conducted its own market evaluation of five leading server virtualization solutions. Before sitting down with vendors, use this tool to narrow the vendors to a shortlist of solutions that best satisfy the company's requirements. http://www.infotech.com/research/server-virtualization-vendor-shortlist-detailed-feature-analysis-tool
	Server Virtualization RFP Template	Use this template to help create a Request for Proposal (RFP) that lists a virtualization solution’s features according to enterprise requirements. http://www.infotech.com/research/it-server-virtualization-rfp-template
	Server Virtualization Vendor Demo Script	Use this demonstration script to provide vendors with a consistent set of instructions, ensuring an objective comparison of product features. http://www.infotech.com/research/it-server-virtualization-vendor-demo-script
Vendor Landscape: Systems Management		
	Vendor Landscape: Systems Management	This vendor landscape examines the infrastructure Systems Management market in order to provide recommendations on which vendors are most suitable for your organization's requirements. http://www.infotech.com/research/it-vendor-landscape-systems-management

	Vendor Landscape Storyboard: Systems Management	Systems Management can cover a wide range of functionality, from monitoring to incident management to capacity management/planning. Determine the right fit for your company's complexity and process maturity. http://www.infotech.com/research/it-vendor-landscape-storyboard-systems-management
Additional Resources		
	Special Collection: Leveraging the Cloud	The cloud market has seen tremendous growth in the last year and can offer great value to IT organizations. Info-Tech's research will help your organization navigate through the waters of cloud storage. http://www.infotech.com/research/it-leveraging-the-cloud
	Prepare for Infrastructure Consolidation Change	Server virtualization and consolidation has become a way of life for most infrastructure managers. The breakdown of physical barrier through virtualization and consolidation has also led to the breakdown of traditional infrastructure rules and roles. IT teams must learn to adapt. http://www.infotech.com/research/it-prepare-for-infrastructure-consolidation-change
	Is the Cloud the End of Infrastructure?	Cloud computing will significantly impact the roles of infrastructure professionals and internal infrastructure processes. Taking ownership of the cloud and internal Infrastructure-as-a-Service is integral to proactively prepare and implement changes that will make the cloud work for you. http://www.infotech.com/research/it-is-the-cloud-the-end-of-infrastructure
	Essentials for Mission Critical Operations	More businesses are finding that they require mission critical operations to support key applications. Mission critical means an application is operational when it is needed. This can range from 24/7 Website access to guaranteed ERP access during a normal 40-hour work week. Business needs dictate mission critical applications and IT staff must plan and deploy technologies to deliver on those requirements. http://www.infotech.com/research/it-essentials-for-mission-critical-operations
	Together at Last: Virtualization and Thin Clients	Info-Tech sees increased interest in thin client deployments as the technology that supports the back end evolves with virtualization. With more options than ever before, understanding the technology is essential to choosing the right solution to suit enterprise needs. http://www.infotech.com/research/together-at-last-virtualization-and-thin-clients

Infrastructure: Storage & Backup Optimization

Type	Document	Description
Blueprint: Develop a Backup Architecture Strategy		
	Develop a Backup Architecture Strategy	Exploding volumes of data are driving the search for faster and more reliable backup, but data value and restore speed are also critical considerations. Designing a best-fit architecture requires these elements be evaluated alongside total cost of ownership. http://www.infotech.com/research/it-evaluate-a-backup-architecture-strategy

Type	Document	Description
	Storyboard: Develop a Backup Architecture Strategy	Exploding volumes of data are driving the search for faster and more reliable backup, but data value and restore speed are also critical considerations. Designing a best-fit architecture requires these elements be evaluated alongside total cost of ownership. http://www.infotech.com/research/it-storyboard-mitigate-costs-maximize-value-with-a-best-fit-backup-architecture-strategy
	Backup Architecture Acquisition TCO Comparison Tool	Total cost of ownership (TCO) is an important consideration when designing a best-fit backup architecture. Comparative analysis of TCO can help you decide whether to move forward with a design or go back to the drawing board. A careful TCO analysis can also help you justify your proposed project to secure funding. http://www.infotech.com/research/it-backup-architecture-acquisition-tco-comparison-tool
	Backup Architecture Strategy Template	This template will help build a backup architecture acquisition business plan for the enterprise, as well as document business justifications for purchase of a particular backup storage configuration. The resulting document is therefore intended for both initial project scoping and for reuse in future projects. http://www.infotech.com/research/it-backup-architecture-acquisition-business-plan
	Find the Best-Fit Backup Architecture Strategy	Exploding volumes of data are driving the search for faster and more reliable backup, but data value and restore speed are also critical considerations. Designing a best-fit architecture requires these elements be evaluated alongside total cost of ownership. http://www.infotech.com/research/it-find-the-best-fit-backup-architecture-strategy
Blueprint: Develop a Cloud Storage Strategy		
	Develop a Cloud Storage Strategy	Adoption of cloud storage is sky-rocketing, thanks to its ease-of-use and low cost entry barrier. Cloud storage is a potential solution in several use cases, but issues like reliability and security are not to be overlooked. http://www.infotech.com/research/it-develop-a-cloud-storage-strategy
	Storyboard: Develop a Cloud Storage Strategy	Cloud storage is typically seen as an alternative to in-house backup or archiving capacity. However, businesses are finding multiple use cases for cloud storage, often adopting it across the enterprise to experience maximum benefits. http://www.infotech.com/research/it-storyboard-develop-a-cloud-storage-strategy
	Cloud Storage TCO Calculator	The Cloud Storage TCO Calculator enables IT professionals to estimate the costs of deploying a cloud storage solution, comparing it to the cost of purchasing new NAS or SAN storage capacity. http://www.infotech.com/research/it-cloud-storage-tco-calculator
	Evaluating & Migrating to Cloud Storage	Regardless of how you plan to use cloud storage, there are key criteria that must be met, and the initial data migration challenges that have to be resolved. Now there are several technologies and vendors that can accelerate your data transfer to the cloud. http://www.infotech.com/research/it-evaluating-migrating-to-cloud-storage

Blueprint: Evaluate the Role of Solid State in the Next Storage Purchase		
	Evaluate the Role of Solid State in the Next Storage Purchase	Solid state storage is in your future. Server side PCI Flash, array Flash cache, and solid state drives (SSDs) are supplanting disks and driving higher IO performance. Discover where to leverage the value of solid state in your infrastructure. http://www.infotech.com/research/it-evaluate-the-role-of-solid-state-in-your-next-storage-purchase
	Storyboard: Evaluate the Role of Solid State in the Next Storage Purchase	This set examines the different ways flash can be deployed as part of a storage solution and evaluates the advantages and disadvantages of each for different environments. http://www.infotech.com/research/it-storyboard-evaluate-the-role-of-solid-state-in-your-next-storage-purchase
	Flash Array Vendor RFP Template	Organizations embarking on a selection process for an enterprise all-flash array vendor may elect to issue a Request for Proposal (RFP) after determining their final selection criteria. Use this RFP template when soliciting vendor responses. http://www.infotech.com/research/flash-array-vendor-rfp-template
	Direct-Attached Flash Storage Vendor RFP Template	Use this Request for Proposal (RFP) template to create a formal invitation for direct-attached flash vendors to submit a proposal meeting your solid state storage requirements. http://www.infotech.com/research/it-direct-attached-flash-storage-vendor-rfp-template
Blueprint: Exploit Storage Beyond the Central Disk Array		
	Exploit Storage Beyond the Central Disk Array	Growing VDI implementations, demand for greater flexibility for virtualization, and increasing unstructured data growth are breaking cost models of traditional storage, leading organizations to search for alternative ways of addressing these problems. http://www.infotech.com/research/exploit-storage-beyond-the-central-disk-array
	Storyboard: Exploit Storage Beyond the Central Disk Array	Learn how to look beyond the storage array to solve modern storage challenges around performance, management, and unstructured data growth, such as PCIe, storage hypervisors, and personal cloud storage. http://www.infotech.com/research/it-storyboard-exploit-storage-beyond-the-central-disk-array
	Storage Virtualization Vendor Interrogation Script	This script provides questions that you can ask a vendor to clarify the specific value-add that the vendor brings to the engagement. Use this interview to help solidify your vendor choice. http://www.infotech.com/research/it-storage-virtualization-vendor-interrogation-script
	VDI Optimization Vendor Interrogation Script	This script provides questions that you can explore with a vendor to clarify the specific value-add that the vendor brings to the engagement. Use this interview to help solidify your vendor choice. http://www.infotech.com/research/it-vdi-optimization-vendor-interrogation-script
	File Sharing Services Vendor Interrogation Script	This script provides questions that you can ask a vendor to clarify the specific value-add that the vendor brings to the engagement. Use this interview to help solidify your vendor choice. http://www.infotech.com/research/it-file-sharing-services-vendor-interrogation-script

▶	Storage Alternatives Beyond the Central Array	Find out how storage is moving beyond the traditional storage array to meet modern challenges. http://www.infotech.com/research/it-storage-alternatives-beyond-the-central-array
	Storage Acquisition Business Plan	The typical trigger for acquiring consolidated networked storage (CNS) is server consolidation; however, getting the most value out of storage purchases requires a strategic context. This business plan template puts the CNS acquisition in the context of a consolidation, cost savings and DRP strategy. Use it to justify not only the purchase but the type and size of the networked storage acquired. http://www.infotech.com/research/storage-acquisition-business-plan
Blueprint: Select and Implement a Backup Solution		
	Select and Implement a Backup Solution	This blueprint is designed for Infrastructure Managers that have been given the authority to evaluate and select the vendor solution for the organization's future backup and recovery technology. http://www.infotech.com/research/select-and-implement-a-backup-solution
Blueprint: Two Days to an Annual Storage Strategy		
	Two Days to an Annual Storage Strategy	Walk through the steps necessary to build a robust storage strategy that is not only responsive to present storage concerns but is prepared for your organization's future. http://www.infotech.com/research/it-two-days-to-an-annual-storage-strategy
Blueprint: Mitigate Costs & Maximize Value with a Consolidated Network Storage Strategy		
	Mitigate Costs & Maximize Value with a Consolidated Network Storage Strategy	Consolidated network storage is a fundamental enabler of agile utility infrastructure. Storage consolidation and server consolidation are like two sides of the same coin. Benefits include better capacity utilization (reduced waste over distributed "islands" of direct attached storage) and the ability to more efficiently deliver availability and recovery for both systems and data. http://www.infotech.com/research/construct-a-storage-consolidation-strategy
	Backup Media Appropriateness Assessment Tool	Organizations engaged in a backup architecture redesign must align their architecture with business properties and requirements to minimize costs, while ensuring adequate data protection. Use the backup architecture appropriateness assessment tool to determine which option is a best-fit for your organization. http://www.infotech.com/research/it-backup-architecture-appropriateness-assessment-tool
▶	Selecting a Consolidated Storage Platform	Consolidated network storage is a strategic enabler that forms the foundation for server consolidation and a unified approach to data and system availability and recovery. http://www.infotech.com/research/selecting-a-consolidated-storage-platform
Blueprint: Purchase Storage Without Buyer's Remorse		
	Purchase Storage Without Buyer's Remorse	Storage is a big ticket item that often only gets purchased every three to five years. Get best practice buyer's advice that leverages the purchasing experience of your IT peers. http://www.infotech.com/research/it-purchase-storage-without-buyers-remorse
	Storyboard: Purchase Storage Without Buyer's Remorse	Storage is a big ticket item that often only gets purchased every three to five years. Get best practice buyer's advice that leverages the purchasing experience of your IT peers. http://www.infotech.com/research/it-storyboard-purchase-storage-without-buyers-remorse

	Storage Reseller Interrogation Script	This script provides questions that you can explore with a reseller to clarify the specific value add that the reseller brings to the engagement. Use this interview to help solidify your vendor choice. http://www.infotech.com/research/it-storage-reseller-interrogation-script
Blueprint: Tackle Explosive Data Growth on a Tight Storage Budget		
	Tackle Explosive Data Growth on a Tight Storage Budget	The rate of data growth is creating a widening storage affordability gap for the typical organization. Complete this project to get a grip on storage capacity requirements and ensure that every dollar spent buys maximum value. http://www.infotech.com/research/tackle-explosive-data-growth-on-a-tight-storage-budget
	Storyboard: Tackle Explosive Data Growth on a Tight Storage Budget	Despite the magnitude of the current data growth explosion, storage does not have to be a drain on other areas of the business. Meet demands without sacrificing key projects or overall profitability. http://www.infotech.com/research/storyboard-tackle-explosive-data-growth-on-a-tight-storage-budget
	Evolution of Storage Workbook	The Evolution of Storage Workbook enables analysis of how well storage needs are currently being met at the organization in terms of performance and capacity. http://www.infotech.com/research/evolution-of-storage-workbook
	Storage Growth Plan Executive Summary Template	This template will help build a Storage Growth Plan document for the enterprise that outlines the recommended approaches for achieving adequate storage growth in terms of capacity growth and usage-case specific requirements, in a financially responsible manner. http://www.infotech.com/research/storage-growth-plan-executive-summary-template
	Storage Technology Alignment Tool	Use this tool to determine best-fit solutions to specific storage use-cases and to estimate total cost of the proposed storage environment. http://www.infotech.com/research/it-storage-technology-alignment-tool
	Storage Strategy Gap Analysis Template	Use this Gap Analysis Template in concert with the Two Days to an Annual Storage Strategy storyboard to develop and document a gap analysis as the basis for the strategic storage plan for the coming year. http://www.infotech.com/research/it-storage-strategy-gap-analysis-template
	Annual Storage Strategy	Use this storage strategy template in concert with the Two Days to an Annual Storage Strategy storyboard to document to create a strategic storage plan for the coming year. http://www.infotech.com/research/it-annual-storage-strategy
	Storage Reseller Interrogation Script	This script provides questions that you can explore with a reseller to clarify the specific value add that the reseller brings to the engagement. Use this interview to help solidify your vendor choice. http://www.infotech.com/research/it-storage-reseller-interrogation-script
Vendor Landscape: Cloud Backup Gateways		
	Vendor Landscape: Cloud Backup Gateways	This Vendor Landscape examines current Cloud Backup Gateway market solutions, as well as the common and differentiating functionalities for the different product offerings, to give users a more in-depth understanding of what is available. http://www.infotech.com/research/it-vendor-landscape-cloud-backup

	Vendor Landscape Storyboard: Cloud Backup Gateways	The Cloud Backup market is still a relatively new one. However there is already a baseline set of features all Cloud Backup solutions should have, and every vendor is attempting to differentiate themselves through advanced features or by specializing in a niche. http://www.infotech.com/research/it-vendor-landscape-storyboard-cloud-backup
	Cloud Backup Gateways Vendor Shortlist Tool	Info-Tech evaluated current market options for Cloud Backup. The industry has been gaining attention as organizations have been turning to the Cloud for more and more purposes. Use this tool to narrow down your options to find a solution that is most compatible with your requirements. http://www.infotech.com/research/it-cloud-backup-vendor-shortlist-tool
Vendor Landscape: Disk Backup		
	Vendor Landscape: Disk Backup	As companies face growing data needs, backup and recovery become essential. The landscape for backup storage is changing with the switch from tape to disk-based backup. http://www.infotech.com/research/it-vendor-landscape-disk-backup
	Vendor Landscape Storyboard: Disk Backup	Disk Backup selection is becoming more difficult as the market matures. Products appear similar, but an in-depth look into features and context will match you with the right vendor. http://www.infotech.com/research/it-vendor-landscape-storyboard-disk-backup
	Disk Backup Vendor Shortlist Tool	This tool allows enterprises to generate a customized shortlist of vendors based on required capabilities and future requirements around disk-based backup. http://www.infotech.com/research/it-disk-backup-vendor-shortlist-tool
Vendor Landscape: Mid-Range to Entry Enterprise Storage Arrays		
	Vendor Landscape: Mid-Range to Entry Enterprise Storage Arrays	Buying storage is more complicated than ever. The usual suspects continue to dominate the array market; however, the start-ups of four or five years ago have matured enough to compete head-to-head. It's critical to find a solution that fits your organization's evolving needs at a price you can afford. http://www.infotech.com/research/vendor-landscape-mid-range-to-entry-enterprise-storage-arrays
	Vendor Landscape Storyboard: Mid-Range to Entry Enterprise Storage Arrays	Buying storage is more complicated than ever. The usual suspects continue to dominate the array market; however, the start-ups of four or five years ago have matured enough to compete head-to-head. It's critical to find a solution that fits your organization's evolving needs at a price you can afford. http://www.infotech.com/research/storyboard-mid-range-to-entry-enterprise-storage-arrays
	Mid-Range to Entry Enterprise Storage Arrays Vendor Shortlist and Detailed Feature Analysis Tool	Buying storage is more complicated than ever. The usual suspects continue to dominate the array market; however, the start-ups of four or five years ago have matured enough to compete head-to-head. It's critical to find a solution that fits your organization's evolving needs at a price you can afford. http://www.infotech.com/research/mid-range-to-entry-enterprise-storage-arrays-vendor-shortlist-and-detailed-feature-analysis-tool
	Storage Reseller Interrogation Script	This script provides questions that you can explore with a reseller to clarify the specific value add that the reseller brings to the engagement. Use this interview to help solidify your vendor choice. http://www.infotech.com/research/it-storage-reseller-interrogation-script

Vendor Landscape: Small to Mid-Range Storage Arrays		
	Vendor Landscape: Small to Mid-Range Storage Arrays	Buying storage is more complicated than ever. The usual suspects continue to dominate the array market; however, the start-ups of four or five years ago have matured enough to compete head-to-head. It's critical to find a solution that fits your organization's evolving needs at a price you can afford. http://www.infotech.com/research/vendor-landscape-small-to-mid-range-storage-arrays--3
	Vendor Landscape Storyboard: Small to Mid-Range Storage Arrays	Buying storage is more complicated than ever. The usual suspects continue to dominate the array market; however, the start-ups of four or five years ago have matured enough to compete head-to-head. It's critical to find a solution that fits your organization's evolving needs at a price you can afford. http://www.infotech.com/research/vendor-landscape-storyboard-small-to-mid-range-storage-arrays--3
	Small to Mid-Range Enterprise Vendor Shortlist Feature Analysis Tool	Buying storage is more complicated than ever. The usual suspects continue to dominate the array market; however, the start-ups of four or five years ago have matured enough to compete head-to-head. It's critical to find a solution that fits your organization's evolving needs at a price you can afford. http://www.infotech.com/research/small-to-mid-range-enterprise-vendor-shortlist-feature-analysis-tool
	Storage Reseller Interrogation Script	This script provides questions that you can explore with a reseller to clarify the specific value add that the reseller brings to the engagement. Use this interview to help solidify your vendor choice. http://www.infotech.com/research/it-storage-reseller-interrogation-script

IT Service Management Research

IT Service Management: Availability & Performance Management

Type	Document	Description
	Downtime Cost Calculator	As companies become increasingly dependent on technology, the probability of experiencing system failures or unavailability also increases. Downtime represents real costs due to lost productivity, lost business opportunities, recovery expenses, and other harmful ripple effects. Quantify downtime costs, understand its effect on the bottom line, and realize the importance of downtime-prevention investments. http://www.infotech.com/research/downtime-cost-calculator

IT Service Management: Configuration Management & CMDB

Type	Document	Description
	Software Configuration Management Solutions: TCO Comparison Tool	Some open-source software configuration management (SCM) tools are as good as their commercial counterparts without the licensing fees. Use this Total Cost of Ownership (TCO) comparison tool to capably determine the cost difference between the two licensing options. http://www.infotech.com/research/software-configuration-management-solutions-tco-comparison-tool

	Software Configuration Management Tool RFP Template	Small enterprises looking to adopt a comprehensive Software Configuration Management (SCM) tool should incorporate a formal Request For Proposal (RFP) into the selection decision. Info-Tech's Software Configuration Management Tool RFP Template speeds up the process while ensuring all critical areas are covered. http://www.infotech.com/research/software-configuration-management-tool-rfp-template

IT Service Management: ITSM/ITIL

Type	Document	Description
	Gap Analysis Template	Planning for the implementation of a systems management solution with data center automation capabilities requires close attention to integration issues. Conduct a gap analysis early in the project planning phase to prioritize efforts and return the maximum bottom line benefit. http://www.infotech.com/research/gap-analysis-template
	Assessment for ITIL Process Maturity and Requirements	The IT Infrastructure Library (ITIL) is becoming generally accepted as a guide for IT service management. However, IT managers and CIOs must understand their enterprise's process maturity in order to determine which ITIL disciplines, if any, will benefit the enterprise. http://www.infotech.com/research/assessment-for-itil-process-maturity-and-requirements

Network & Communications Research

Network & Communications: Desktop & Mobile Management

Type	Document	Description
Blueprint: Master the Ever-Expanding Puzzle of End-User Computing With a Strategy and Roadmap		
	Master the Ever-Expanding Puzzle of End-User Computing With a Strategy and Roadmap	As the end-user computing landscape continues to grow more and more complex, a strategy and roadmap is essential to identify required initiatives over the next five years and then to fit the pieces together on a timeline. http://www.infotech.com/research/master-the-ever-expanding-puzzle-of-end-user-computing-with-a-strategy-and-roadmap
	Storyboard: Master the Ever-Expanding Puzzle of End-User Computing with a Strategy and Roadmap	Determine the direction of end-user computing in your organization. Follow this blueprint to prioritize end-user computing initiatives using business goals and unique user groups to develop a detailed strategy and roadmap. http://www.infotech.com/research/storyboard-master-the-ever-expanding-puzzle-of-end-user-computing-with-a-strategy-and-roadmap
	End-User Computing Roadmap Business Case	Customize the components within this template to develop a business case for an end-user computing strategy and roadmap for communication and documentation purposes. http://www.infotech.com/research/end-user-computing-roadmap-business-case
	End-User Computing Roadmap Workbook	Use this workbook to document and update information and decisions from your end-user computing roadmapping process. http://www.infotech.com/research/end-user-computing-roadmap-workbook

Type	Document	Description
	End-User Computing Strategy and Roadmap TCO Calculator	End-user computing options grow more and more complex. Estimate costs and keep on budget using a five-year TCO calculator. http://www.infotech.com/research/end-user-computing-strategy-and-roadmap-tco-calculator
	End-User Computing Strategy and Roadmap User Satisfaction Survey Template	Gain a better grasp on what end users expect from end-user computing. http://www.infotech.com/research/end-user-computing-strategy-and-roadmap-user-satisfaction-survey-template
Blueprint: Reduce Costs Through Printer Consolidation		
	Reduce Costs Through Printer Consolidation	Most organizations are unaware that they can save as much as 65% of total printing costs through printer consolidation efforts. However, getting buy-in to consolidate and implementation can be difficult. Use this research to help you overcome the barriers to printer consolidation and successfully reduce costs. http://www.infotech.com/research/reduce-costs-through-printer-consolidation--2
	Storyboard: Reduce Costs Through Printer Consolidation	Use this research to help you overcome the barriers to printer consolidation and successfully reduce costs. http://www.infotech.com/research/storyboard-reduce-costs-through-printer-consolidation--2
	Printer Configuration Item Record	Use this template to record information about each of your printers. http://www.infotech.com/research/printer-configuration-item-record
	Printer Consolidation Action Plan Tool	Use this template to help you plan the initiatives involved in consolidating printers and track your project success. http://www.infotech.com/research/printer-consolidation-action-plan-tool
	Printer Consolidation Business Case Template	Use this template to help you develop a business case to consolidate your printers and structure the project. http://www.infotech.com/research/printer-consolidation-business-case-template
	Printer Consolidation RFP Scoring Tool	Use this RFP scoring tool to help you select a printer vendor. http://www.infotech.com/research/printer-consolidation-rfp-scoring-tool
	Printer Consolidation RFP Template	Use this RFP to help you clarify your needs to vendors and understand their capabilities and offerings. http://www.infotech.com/research/printer-consolidation-rfp-template
	Printer Consolidation Tool	Use this printer consolidation tool to help you through various stages of your printer consolidation project. http://www.infotech.com/research/printer-consolidation-tool
Vendor Landscape: Enterprise Mobility Management		
	Vendor Landscape: Enterprise Mobility Management	EMM offers a complex suite of features. Select a vendor that simplifies management and enhances mobile functionality in your organization. http://www.infotech.com/research/vendor-landscape-enterprise-mobility-management
	Vendor Landscape Storyboard: Enterprise Mobility Management	Mobile device management (MDM) has evolved into enterprise mobility management (EMM). Find the right suite for managing mobile devices, applications, and content. http://www.infotech.com/research/vendor-landscape-storyboard-enterprise-mobility-management
	Enterprise Mobility Management RFP Template	Issuing a request for proposal (RFP) is a critical step in evaluating enterprise mobility management (EMM) vendors. http://www.infotech.com/research/enterprise-mobility-management-rfp-template

Type	Document	Description
	Enterprise Mobility Management Vendor Demonstration Script	When a shortlist of enterprise mobility management (EMM) vendors has been created and it is time to have them demonstrate their EMM solution, there is a need for a consistent demo process to directly compare features. http://www.infotech.com/research/enterprise-mobility-management-vendor-demonstration-script
	Enterprise Mobility Management Vendor Shortlist & Detailed Feature Analysis Tool	This tool allows organizations to profile their enterprise mobility management (EMM) requirements and generate a ranked shortlist of the vendors included in the vendor landscape. http://www.infotech.com/research/enterprise-mobility-management-vendor-shortlist-detailed-feature-analysis-tool
Blueprint: Architect the Mobile Strategy in Two Days		
	Architect the Mobile Strategy in Two Days	Mobile technology is mobilizing identities, but is it mobilizing your workforce? Leverage the powerful potential of mobile to generate enterprise growth with a strategy that builds a direct path to your mobility goals. http://www.infotech.com/research/it-architect-the-mobile-strategy-in-two-days
	Storyboard: Architect the Mobile Strategy in Two Days	Mobile technology is mobilizing identities, but is it mobilizing your workforce? Leverage the powerful potential of mobile to generate enterprise growth with a strategy that builds a direct path to your mobility goals. http://www.infotech.com/research/it-storyboard-architect-the-mobile-strategy-in-two-days
	Mobile Inventory Estimator	Use this tool to approximate the mobile resources already available to you - whether corporate-issued or personally-owned. http://www.infotech.com/research/it-mobile-inventory-estimator
	Mobile Tech Monitor	Use this tool to track the value and readiness of mobile technology specific to the needs of your enterprise. http://www.infotech.com/research/it-mobile-tech-monitor
	Mobile SWOT Analysis	Perform a mobile SWOT analysis annually. Use this tool to identify strengths, weaknesses, opportunities, and threats of mobile technology customized to the needs of your enterprise. http://www.infotech.com/research/it-mobile-swot-analysis
	Mobile Strategy Summary	Integrate a consolidated version of your mobile strategy into your overarching IT strategy. http://www.infotech.com/research/it-mobile-strategy-summary
	Mobile Strategy Document	Create a polished version of your complete mobile strategy to be revisited on an annual basis. http://www.infotech.com/research/it-mobile-strategy-document
Blueprint: Consider BYOC as Part of a Desktop-as-a-Service Strategy		
	Consider BYOC as Part of a Desktop-as-a-Service Strategy	Despite early resistance, consumer technology is infiltrating the enterprise and has taken a firm hold. The proliferation of employee-purchased smartphones, tablets, and netbooks has organizations looking beyond the pocket to the desktop. http://www.infotech.com/research/it-develop-a-byoc-strategy-to-move-from-asset-to-service-management
	Storyboard: Consider BYOC as Part of a Desktop-as-a-Service Strategy	Bring Your Own Computer (BYOC) is a very polarizing issue in IT, and there are some serious and legitimate concerns. However, there are also some real benefits, and the trick is to find the balance between security and flexibility that best fits your organization. http://www.infotech.com/research/it-storyboard-consider-byoc-as-part-of-a-desktop-as-a-service-strategy

Type	Document	Description
	BYOC Readiness Assessment Tool	The BYOC Readiness Assessment Tool provides IT managers with an objective assessment of the current state of their organization's capabilities across four enabling competency areas (infrastructure, security, operations & support, and policy) and offers recommendations for improvement. http://www.infotech.com/research/it-byoc-readiness-assessment-tool
	Communications Plan Template for a BYOC Program	A communications plan is a valuable tool to guide your communications efforts in change management when charged with rolling out a BYOC program. Use this template to clarify goals and objectives and to put the coming changes into a service context. http://www.infotech.com/research/it-communications-plan-template-for-a-byoc-program
	BYOC Acceptable Use Policy	Devices in a BYOC program access business resources for business use, but they are also designed for personal use. Accessing business resources with such devices must be done in a safe, secure manner. Use this policy template to clearly define the freedoms and limitations of your organization's BYOC program. http://www.infotech.com/research/it-byoc-acceptable-use-policy
	BYOC Strategy Position Template	IT departments of all shapes and sizes are being asked to respond to interest (and sometimes direct pressure) in adopting BYOC programs. This strategy position template will help objectively define IT's position on BYOC for the organization and inform the direction of future investments as needed. http://www.infotech.com/research/it-byoc-strategy-position-template
Blueprint: Create a Consumer Technology Integration Plan in Five Steps		
	Create a Consumer Technology Integration Plan in Five Steps	Stop resisting consumer technology in the enterprise and turn it into a competitive advantage. Use consumerization to drive innovation within your organization. http://www.infotech.com/research/it-create-a-consumer-technology-integration-plan-in-five-steps
	Storyboard: Create a Consumer Technology Integration Plan in Five Steps	Consumerization is invading IT whether you're ready or not. Most organizations feel constantly behind, and struggle to stay on top of rapid changes in consumer technology. http://www.infotech.com/research/it-storyboard-create-a-consumer-technology-integration-plan-in-five-steps
	Consumerization Strategy Tool Set	Advancements in consumer technology can catch you off guard if you are not properly prepared. Evaluate emerging consumer technologies annually, and start managing consumer technologies proactively instead of reactively. http://www.infotech.com/research/it-consumerization-strategy-tool-set
	Consumerization Strategy Document	Create a comprehensive consumerization strategy document that you can revisit on an annual basis. Use this template to foster continuous improvement and to facilitate comparisons. http://www.infotech.com/research/consumerization-strategy-document
	Consumerization Strategy Summary	Summarize your strategy document, and insert it into your innovation strategy. Use this template to ensure that your consumerization strategy is aligned with your broader innovation and IT strategies. http://www.infotech.com/research/it-consumerization-strategy-summary
Blueprint: Create a Practical BYOE Action Plan		
	Create a Practical BYOE Action Plan	Now, it's personal. Prepare for a world in which employees bring their own devices, applications, networks, and identities: BYOE is here to stay. http://www.infotech.com/research/create-a-practical-byoe-action-plan

Type	Document	Description
	Storyboard: Create a Practical BYOE Action Plan	Now, it's personal. Prepare for a world in which employees bring their own devices, applications, networks, and identities: BYOE is here to stay. http://www.infotech.com/research/storyboard-create-a-practical-byoe-action-plan
	BYOE Goal Analysis Tool	Set your organization's BYOE goals, and create practical action steps to achieve them. http://www.infotech.com/research/byoe-goal-analysis-tool
	BYO Inventory Estimator Tool	Start by understanding the current state of your BYOE technology. http://www.infotech.com/research/byo-inventory-estimator-tool
	BYOE Strategy Document	Document your BYOE strategy, and revisit it on an annual basis. http://www.infotech.com/research/byoe-strategy-document
Blueprint: Develop & Enforce Policies that Securely Enable a Mobile Workforce		
	Develop & Enforce Policies that Securely Enable a Mobile Workforce	A strong set of mobile policies enables a secure and productive workforce. Use this solution set to develop a set of user and technology policies that will support a mobile workforce today, while preparing for a future in which mobile devices don't matter. http://www.infotech.com/research/it-develop-enforce-policies-that-securely-enable-a-mobile-workforce
	Storyboard: Develop & Enforce Policies that Securely Enable a Mobile Workforce	A strong set of mobile policies enables a secure and productive workforce. Use this solution set to develop a set of user and technology policies that will support a mobile workforce today, while preparing for a future in which mobile devices don't matter. http://www.infotech.com/research/it-storyboard-develop-enforce-policies-that-securely-enable-a-mobile-workforce
	Mobile Device Connectivity & Allowance Policy Example	A strong set of mobile policies enables a secure and productive workforce, but it can be challenging to develop policies that balance security with productivity, while weighing the needs of today against the disruption of tomorrow. http://www.infotech.com/research/it-mobile-device-connectivity-allowance-policy-example
	Waiver to Wipe Contents Agreement Example	It can be challenging to develop policies that balance security with productivity, while weighing the needs of today against the disruption of tomorrow. Use this example to help create a policy suited to enterprise needs. http://www.infotech.com/research/it-waiver-to-wipe-contents-agreement-example
	Mobile Device Acceptable Use Policy Template	A mobile device acceptable use policy is essential for an organization to put its mobile strategy in writing and communicate that strategy to users. Use this template as a starting point for crafting your own mobile acceptable use policy. http://www.infotech.com/research/mobile-device-acceptable-use-policy
	Mobile Device Remote Wipe Waiver Template	Having the ability to remote wipe is one of the most basic tools in IT's arsenal for securing mobile devices. Use this remote wipe waiver template to create a document that communicates your remote wipe policies. http://www.infotech.com/research/it-mobile-device-remote-wipe-waiver-template
	Mobile Device Reimbursement Policy Template	Many organizations reimburse employees for expenses related to mobile devices. Whether reimbursing for hardware, telecom expenses, or both, use this template to define your reimbursement policies and communicate them to users. http://www.infotech.com/research/it-mobile-device-reimbursement-policy-template

Type	Document	Description
	Mobile Device Policy Training Slideshow	Customize this training slideshow to present or distribute a document that communicates your policies to employees. http://www.infotech.com/research/it-mobile-device-policy-training-slideshow
Blueprint: Develop a Desktop Virtualization Strategy		
	Develop a Desktop Virtualization Strategy	Desktop Virtualization adoption has more than doubled in less than two years and is approaching its full potential with new technology working for broader use cases. http://www.infotech.com/research/benefits-and-costs-of-desktop-virtualization
	Storyboard: Develop a Desktop Virtualization Strategy	Desktop virtualization redefines how desktop computer services are delivered, offering the best of both worlds: centralization plus full desktops for more types of users. Evaluate the potential and design a right-fit deployment for your organization. http://www.infotech.com/research/it-storyboard-develop-a-desktop-virtualization-strategy
	Desktop Virtualization TCO Calculator	The Desktop Virtualization TCO Calculator model provides organizations with a framework for estimating the costs associated with deploying a virtual desktop solution relative to refreshing a fleet of desktops. http://www.infotech.com/research/it-desktop-virtualization-tco-calculator
	Desktop Virtualization Appropriateness Assessment Tool	Making the decision to deploy desktop virtualization requires consideration of numerous variables. The Desktop Virtualization Appropriateness Assessment Tool will help you ensure every relevant factor is taken into consideration. http://www.infotech.com/research/desktop-virtualization-appropriateness-assessment-tool
Blueprint: Develop a Mobile Management Strategy		
	Develop a Mobile Management Strategy	A mobile management strategy is essential for unlocking the benefits of mobility in the enterprise. Follow these steps to implement a strong mobile strategy tailored to your organization. http://www.infotech.com/research/understand-and-develop-a-mobile-management-strategy-
	Storyboard: Develop a Mobile Management Strategy	Small devices can be a big challenge. Follow the steps in this storyboard to develop a customized strategy for managing mobile devices such as smartphones and tablets. http://www.infotech.com/research/it-storyboard-develop-a-mobile-management-strategy
	Mobile Device Acceptable Use Policy Template	A mobile device acceptable use policy is essential for an organization to put its mobile strategy in writing and communicate that strategy to users. Use this template as a starting point for crafting your own mobile acceptable use policy. http://www.infotech.com/research/mobile-device-acceptable-use-policy
	Mobile Device Remote Wipe Waiver Template	Having the ability to remote wipe is one of the most basic tools in IT's arsenal for securing mobile devices. Use this remote wipe waiver template to create a document that communicates your remote wipe policies. http://www.infotech.com/research/it-mobile-device-remote-wipe-waiver-template

Type	Document	Description
	Mobile Device Reimbursement Policy Template	Many organizations reimburse employees for expenses related to mobile devices. Whether reimbursing for hardware, telecom expenses, or both, use this template to define your reimbursement policies and communicate them to users. http://www.infotech.com/research/it-mobile-device-reimbursement-policy-template
	Mobile Device Policy Training Slideshow	Customize this training slideshow to present or distribute a document that communicates your policies to employees. http://www.infotech.com/research/it-mobile-device-policy-training-slideshow
Blueprint: Develop an Enterprise Windows Migration and Deployment Plan		
	Storyboard: Develop an Enterprise Windows Migration and Deployment Plan	Organizations still running Windows XP will need to migrate to a new OS in the coming year or be prepared for the cost and risk of running an unsupported operating system. http://www.infotech.com/research/it-storyboard-develop-an-enterprise-windows-migration-and-deployment-plan
Blueprint: Exploit Disruptive Technology to Drive IT Efficiency and Business Opportunity		
	Exploit Disruptive Technology to Drive IT Efficiency and Business Opportunity	Science fiction is about to become science fact, and many CIOs find themselves unprepared when asked how new technologies affect business strategy or IT functionality. Use this blueprint to explore the most disruptive technologies of 2014, and more importantly, create a simple process for predicting the future and preparing for disruption. http://www.infotech.com/research/exploit-disruptive-technology-to-drive-it-efficiency-and-business-opportunity
	Storyboard: Exploit Disruptive Technology to Drive IT Efficiency and Business Opportunity	Science fiction is about to become science fact. Use this blueprint to explore the most disruptive technologies of 2014, and more importantly, create a simple process for predicting the future and preparing for disruption. http://www.infotech.com/research/storyboard-exploit-disruptive-technology-to-drive-it-efficiency-and-business-opportunity
	Disruptive Technology Research Database Tool	Keep track of the newest technologies and their current status in your organization with the Disruptive Technology Research Database Tool. http://www.infotech.com/research/disruptive-technology-research-database-tool
	Disruptive Technology Project Planning and Monitoring Tool	Exploiting disruptive technology will have a lot of moving parts. Use this tool to plan, organize, and monitor project work for the disruptive technology exploitation team. http://www.infotech.com/research/disruptive-technology-project-planning-and-monitoring-tool
	Disruptive Technology Exploitation Plan Template	Use this template to summarize the findings of the disruptive technology exploitation team, and act as a long-term implementation plan. http://www.infotech.com/research/disruptive-technology-exploitation-plan-template
	Disruptive Technology Training Deck	Introduce your team to some concepts that will help them research disruptive technology and populate a long list of technology to analyze. http://www.infotech.com/research/disruptive-technology-training-deck
Blueprint: Implement Enterprise Mobility Management		
	Implement Enterprise Mobility Management	For many organizations, enterprise mobility management (EMM) is the next step after developing a mobile strategy. Use this blueprint to develop a plan to implement EMM that covers all the necessary decisions and steps. http://www.infotech.com/research/it-implement-enterprise-mobility-management

Type	Document	Description
	Storyboard: Implement Enterprise Mobility Management	Enterprise Mobility Management has evolved beyond managing mobile hardware. Implement an EMM solution today to take control of all aspects of mobility. http://www.infotech.com/research/storyboard-implement-enterprise-mobility-management
	EMM Help Desk Metrics Reporting Tool	Use this tool to record and visualize how help desk deals with mobile issues in your organization, before and after implementing enterprise mobility management. http://www.infotech.com/research/emm-help-desk-metrics-reporting-tool
	EMM Current State Summary Tool	Use the EMM Current State Summary Tool to get a better overall snapshot of your current mobility situation. http://www.infotech.com/research/emm-current-state-summary-tool
	EMM Vendor Shortlist & Detailed Feature Analysis Tool	Develop a shortlist of enterprise mobility management vendors based on your priorities and feature requirements. http://www.infotech.com/research/emm-vendor-shortlist-detailed-feature-analysis-tool
	EMM TCO Calculator	Determine the total cost of implementing enterprise mobility management in your organization. http://www.infotech.com/research/emm-tco-calculator
	EMM TCO Calculator (Example Scenarios)	View an example of the total cost of implementing enterprise mobility management in a hypothetical organization, then estimate your own costs. http://www.infotech.com/research/emm-tco-calculator-example-scenarios
	EMM End-User Satisfaction Survey Template	Understanding end users' attitudes towards the organization's current mobile strategy is essential to implementing a successful enterprise mobility management solution. This survey template offers a series of sample satisfaction questions that an IT department can present to its user base. http://www.infotech.com/research/emm-end-user-satisfaction-survey-template
	EMM Implementation Plan Template	Use this template to develop a business case and an implementation plan for enterprise mobility management. http://www.infotech.com/research/emm-implementation-plan-template
	Mobile Device Acceptable Use Policy Template	A mobile device acceptable use policy is essential for an organization to put its mobile strategy in writing and communicate that strategy to users. Use this template as a starting point for crafting your own mobile acceptable use policy. http://www.infotech.com/research/mobile-device-acceptable-use-policy
	Mobile Device Remote Wipe Waiver Template	Having the ability to remote wipe is one of the most basic tools in IT's arsenal for securing mobile devices. Use this remote wipe waiver template to create a document that communicates your remote wipe policies. http://www.infotech.com/research/it-mobile-device-remote-wipe-waiver-template
	Mobile Device Reimbursement Policy Template	Many organizations reimburse employees for expenses related to mobile devices. Whether reimbursing for hardware, telecom expenses, or both, use this template to define your reimbursement policies and communicate them to users. http://www.infotech.com/research/it-mobile-device-reimbursement-policy-template
	Mobile Device Policy Training Slideshow	Customize this training slideshow to present or distribute a document that communicates your policies to employees. http://www.infotech.com/research/it-mobile-device-policy-training-slideshow

Type	Document	Description
Blueprint: Incorporate Mobile into the Enterprise Print Strategy		
	PUD and PUA Adoption Cost Tool	Understand how personal and unmanaged devices (PUDs) could impact your budget. Use this tool decide how much the potential fixes will cost you to implement, and what savings are available by leveraging PUDs to re-design your infrastructure. http://www.infotech.com/research/it-pud-and-pua-adoption-cost-tool
	Personal Mobile Device Acceptable Use Policy	Developing and enforcing a personal mobile acceptable use policy is critical to maintaining corporate network security. This policy outlines the baseline behaviors required to ensure that employees, contractors, and related constituents who use mobile devices to access corporate resources for business use, do so in a safe, secure, and responsible manner. http://www.infotech.com/research/it-personal-mobile-device-acceptable-use-policy
Blueprint: Implement Virtual Desktop Infrastructure		
	Implement Virtual Desktop Infrastructure	The project outlines how to successfully implement VDI, migrating some or all of your workforce from fat clients to remote access desktops to give them access anytime, anywhere. This project will assist you in avoiding common pitfalls so that your project is on time and on budget. http://www.infotech.com/research/implement-virtual-desktop-infrastructure
Blueprint: Build a Comprehensive End User Computing Strategy and Roadmap to Cost-Effectively Empower Users		
	Build a Comprehensive End User Computing Strategy and Roadmap to Cost-Effectively Empower Users	Develop a strategy and roadmap to fit all the pieces together and efficiently integrate end user computing trends into your organization. http://www.infotech.com/research/build-a-comprehensive-end-user-computing-strategy-and-roadmap-to-cost-effectively-empower-users
Blueprint: Plan, Select, and Deploy Windows 7 the Right Way		
	Plan, Select, and Deploy Windows 7 the Right Way	This solution set will help you determine what version of Windows 7 is most appropriate and develop a deployment strategy and plan for your organization. http://www.infotech.com/research/plan-select-and-deploy-windows-7-the-right-way
Blueprint: Take Steps to Successful VDI Implementation		
	Storyboard: Take Steps to Successful VDI Implementation	Virtual Desktop Infrastructure (VDI) transforms the way desktop services are delivered to end users. But the change can be challenging to both IT and the users. The key to success is a carefully crafted implementation plan, based on a carefully executed pilot. http://www.infotech.com/research/it-storyboard-take-steps-to-successful-vdi-implementation
	Take Steps to Successful VDI Implementation	Build a Virtual Desktop Infrastructure (VDI) implementation plan based on the benefits that guided you to it in the first place. http://www.infotech.com/research/steps-to-vdi-implementation
	Consumer Technology SWOT Analysis and Tech Monitor Tool	Advancements in consumer technology can catch you off guard if you are not properly prepared. Evaluate emerging consumer technologies annually, and start managing consumer technologies proactively instead of reactively. http://www.infotech.com/research/it-consumer-technology-swot-analysis-and-tech-monitor-tool

Type	Document	Description
	Desktop Virtualization Vendor Shortlist Tool	Info-Tech conducted its own market evaluation of six leading desktop virtualization solutions. Before sitting down with vendors, use this tool to narrow the vendors to a shortlist of solutions that best satisfy the company's requirements. http://www.infotech.com/research/it-desktop-virtualization-vendor-shortlist-tool
	Desktop Virtualization TCO Calculator	The Desktop Virtualization TCO Calculator model provides organizations with a framework for estimating the costs associated with deploying a virtual desktop solution relative to refreshing a fleet of desktops. http://www.infotech.com/research/it-desktop-virtualization-tco-calculator
	Virtual Desktop Infrastructure Evaluation & RFP Response Tool	Each desktop virtualization vendor has its own strengths and weaknesses. Use this tool to ensure that shortlisted vendors meet enterprise requirements. http://www.infotech.com/research/it-virtual-desktop-infrastructure-evaluation-rfp-response-tool
	User Acceptance Testing Checklist	User acceptance testing is one of the final stages of the application lifecycle before deployment. Use this checklist to help control and manage the user acceptance testing process. http://www.infotech.com/research/user-acceptance-testing-checklist
	Guest Wireless Internet Acceptable Use Policy	The guest wireless internet policy provides an understanding of what is expected for guests when using the Internet. http://www.infotech.com/research/guest-wireless-internet-acceptable-use-policy
	VDI Pilot Test Assessment Template	The pilot test assessment will help guide your evaluation of the state of the pilot project. It provides a place to record technical requirements, KPIs, and existing or potential problems that have been, or will be, experienced by end users and stuff. http://www.infotech.com/research/it-vdi-pilot-test-assessment-template
	VDI Project Charter Template	A Project Charter is an integral document to any initiative. This template will help clarify goals, determine guidelines, and establish milestones to keep a VDI implementation on track. http://www.infotech.com/research/it-vdi-project-charter-template
	VDI End-User Satisfaction Survey	The VDI End User Satisfaction Survey is a great way to measure the effectiveness of your VDI implementation. End users can provide valuable feedback on the performance of their workstations and IT support. http://www.infotech.com/research/it-vdi-end-user-satisfaction-survey
	VDI Communication Plan Template	End user acceptance is one of the biggest challenges to desktop virtualization adoption. IT should have a plan in place to guide communication efforts during the transition. By maintaining a consistent message and a consistent front, IT can set expectations for end users and combat resistance to change. http://www.infotech.com/research/vdi-communication-plan-template
▶	Smart TV: Enterprises Invade the Living Room	Almost half of North American households already have televisions with smart capabilities (most through a separate device, but increasingly through features built-in to new televisions). More importantly, Info-Tech predicts that by 2013, the majority of the public will be comfortable with, and expect smart content on their TVs. Make sure your organization is ready to provide that content as soon as there is demand for it. http://www.infotech.com/research/it-smart-tv-enterprises-invade-the-living-room

Type	Document	Description
	Windows 7 Version Selection Tool	Microsoft's latest OS, Windows 7, has a multitude of product options. Each version of Windows 7 is geared at a certain type of organization and, as such, has a unique functionality set out of the box. Use this tool to help your organization determine which version of Windows 7 to deploy. http://www.infotech.com/research/windows-7-version-selection-tool
	Windows 7 Deployment Strategy Selection Tool	Microsoft has provided a host of tools and literature regarding the most efficient way to deploy Windows 7 across organizations of varying size. Use this tool to help your organization determine how to deploy Windows 7 and which Microsoft tools to use to ensure a smooth rollout. http://www.infotech.com/research/windows-7-deployment-strategy-selection-tool
Blueprint: Prepare For a New World of Workforce Computing		
	Mobile Device Acceptable Use Policy Template	A mobile device acceptable use policy is essential for an organization to put its mobile strategy in writing and communicate that strategy to users. Use this template as a starting point for crafting your own mobile acceptable use policy. http://www.infotech.com/research/mobile-device-acceptable-use-policy
	Mobile Device Remote Wipe Waiver Template	Having the ability to remote wipe is one of the most basic tools in IT's arsenal for securing mobile devices. Use this remote wipe waiver template to create a document that communicates your remote wipe policies. http://www.infotech.com/research/it-mobile-device-remote-wipe-waiver-template
	BYOC Acceptable Use Policy	Devices in a BYOC program access business resources for business use, but they are also designed for personal use. Accessing business resources with such devices must be done in a safe, secure manner. Use this policy template to clearly define the freedoms and limitations of your organization's BYOC program. http://www.infotech.com/research/it-byoc-acceptable-use-policy
Blueprint: Secure the Network in a BYOD World		
	Secure the Network in a BYOD World	BYOD is an inevitable reality in most organizations. Know how to secure your network and properly manage it. http://www.infotech.com/research/it-secure-your-network-in-a-byod-world
	Storyboard: Secure the Network in a BYOD World	BYOD is an inevitable reality in most organizations. Know how to secure your network and properly manage it. http://www.infotech.com/research/storyboard-secure-your-network-in-a-byod-world
	Risk Tolerance Diagnostic Tool	This tool allows organizations to determine whether their perception of their organization's risk tolerance matches with reality. http://www.infotech.com/research/it-risk-tolerance-diagnostic-tool
Blueprint: Stop Managing Endpoints		
	Stop Managing Endpoints	This blueprint will walk through developing a pilot plan for reducing endpoint management. Technology such as desktop virtualization, application virtualization, the cloud, and enterprise mobility management can reduce or replace traditional endpoint management. http://www.infotech.com/research/stop-managing-endpoints
	Storyboard: Stop Managing Endpoints	Develop a plan to exit endpoint management; instead, deliver applications and services to any endpoint http://www.infotech.com/research/storyboard-stop-managing-endpoints

Type	Document	Description
	Endpoint Management Goal Analysis Tool	Analyze your endpoint management goals to turn them into practical action steps. Use this tool in conjunction with the storyboard to brainstorm, analyze, and prioritize a set of goals. http://www.infotech.com/research/endpoint-management-goal-analysis-tool
	Stop Managing Endpoints Readiness Assessment	A readiness tool to summarize your current state and assess your readiness for exiting endpoint management. http://www.infotech.com/research/stop-managing-endpoints-readiness-assessment
	Stop Managing Endpoints TCO Calculator (Pre-Populated Example)	A total cost of ownership tool to compare your current state to your goal state of getting out of endpoint management. This version of the tool is pre-populated with example information. http://www.infotech.com/research/stop-managing-endpoints-tco-calculator-pre-populated-example
	Stop Managing Endpoints TCO Calculator	A total cost of ownership tool to compare your current state to your goal state of getting out of endpoint management. http://www.infotech.com/research/stop-managing-endpoints-tco-calculator
	End-User Endpoint Satisfaction Survey	A template for developing an end user survey, in order to identify users' issues with the current endpoint management situation, then evaluate the effectiveness of your endpoint management exit plan over time. http://www.infotech.com/research/end-user-endpoint-satisfaction-survey
	Endpoint Management Exit Plan Pilot Business Case Template	Communicate your endpoint management exit plan with a summary and business case. Use this template to get started. http://www.infotech.com/research/endpoint-management-exit-plan-pilot-business-case-template
Blueprint: Switch Mobile Platforms		
	Switch Mobile Platforms	This storyboard will help you switch away from mobile platforms that are failing, such as BlackBerry; decide which platforms should be migrated to; and develop a plan to make the migration happen, from phasing out the old platform, to getting users on board, to implementing management infrastructure. http://www.infotech.com/research/switch-mobile-platforms
	Storyboard: Switch Mobile Platforms	Learn how to switch mobile platforms without wasting resources, from understanding the market, to gaining project approval and developing a plan. http://www.infotech.com/research/storyboard-switch-mobile-platforms
	Switch Mobile Platforms Project Approval Tool	Use Info-Tech's Project Approval Tool to better understand the mobile platform situation facing your organization today. http://www.infotech.com/research/switch-mobile-platforms-project-approval-tool
	Switch Mobile Platforms TCO Calculator	Determine the total cost of switching mobile platforms in your organization. http://www.infotech.com/research/switch-mobile-platforms-tco-calculator
	Switch Mobile Platforms TCO Calculator (Example Scenarios)	View an example of the total cost of switching mobile platforms in a hypothetical organization, then estimate your own costs. http://www.infotech.com/research/switch-mobile-platforms-tco-calculator-example-scenarios
	Switch Mobile Platforms Project Planning and Monitoring Tool	Establish a working action plan, with tasks, roles, responsibilities, and estimated dates of completion to keep your plan for switching mobile platforms on track. http://www.infotech.com/research/switch-mobile-platforms-project-planning-and-monitoring-tool

Type	Document	Description
	Switch Mobile Platforms End-User Survey Template	Use this survey template to provide end users with a series of sample satisfaction questions that IT can use to determine the effectiveness of the current mobile platform. http://www.infotech.com/research/switch-mobile-platforms-end-user-survey-template
	Switch Mobile Platforms Project Approval Template	Use Info-Tech's Switch Mobile Platform Project Approval Template to get executives and stakeholders on board. http://www.infotech.com/research/switch-mobile-platforms-project-approval-template
Blueprint: Tackle the Technology of Consumerization		
	Tackle the Technology of Consumerization	There is no need to fear consumers. Understand the technology that has consumerized the enterprise. http://www.infotech.com/research/it-tackle-the-technology-of-consumerization
	Storyboard: Tackle the Technology of Consumerization	Employees have become savvy consumers, and they are marching into the enterprise with consumer technology. Use this consumerization research to deal with the invasion, and make the most of consumerization by understanding consumer technology. http://www.infotech.com/research/it-storyboard-tackle-the-technology-of-consumerization
Blueprint: Transition to BYOD and Beyond		
	Transition to BYOD and Beyond	Personal devices can be a big challenge when they are brought to work. Use this set to develop a customized strategy for transitioning to a BYOD-friendly organization and managing personal devices in the workplace, and calculate the TCO of viable options. http://www.infotech.com/research/it-transition-to-byod-and-beyond
	Storyboard: Transition to BYOD and Beyond	Personal devices can be a big challenge when they are brought to work. Use this storyboard to develop a customized strategy for transitioning to a BYOD-friendly organization and managing personal devices in the workplace. http://www.infotech.com/research/it-storyboard-transition-to-byod-and-beyond
	BYOD Total Cost of Ownership Tool	There are many strategy options when it comes to bring your own device (BYOD). Device types, reimbursement amounts, and the number of people allowed to bring their own devices can all be varied. Use this tool to observe the effect that each decision has on TCO. http://www.infotech.com/research/it-byod-total-cost-of-ownership-tool
Vendor Landscape: Desktop Virtualization		
	Vendor Landscape: Desktop Virtualization	This vendor landscape looks at general trends currently affecting the desktop virtualization market. It provides an evaluation of five vendors in the space based on their product offerings and overall vendor capabilities. http://www.infotech.com/research/select-the-right-vendor-for-desktop-virtualization
	Vendor Landscape Storyboard: Desktop Virtualization	Desktop virtualization continues to expand in both function and use case. Select the solution that fits your desktop situation and provides the best user experience and TCO for your organization's needs. http://www.infotech.com/research/-storyboard-select-a-desktop-virtualization-solution

Type	Document	Description
	Desktop Virtualization Vendor Shortlist and Detailed Feature Analysis Tool	Info-Tech conducted its own market evaluation of six leading desktop virtualization solutions. Before sitting down with vendors, use this tool to narrow the vendors to a shortlist of solutions that best satisfy the company's requirements. http://www.infotech.com/research/desktop-virtualization-vendor-shortlist-and-detailed-feature-analysis-tool
	Desktop Virtualization RFP Template	Organizations in the selection process for a desktop virtualization solution should issue an RFP to gather required information, and make an informed final decision. This RFP template will help streamline your selection process. http://www.infotech.com/research/it-desktop-virtualization-solution-rfp-template
	Desktop Virtualization Vendor Demo Script	Use this demonstration script to provide vendors with a consistent set of instructions, ensuring an objective comparison of product features. http://www.infotech.com/research/desktop-virtualization-vendor-demo-script
Vendor Landscape: Thin Client		
	Vendor Landscape: Thin Client	This vendor landscape looks at general trends currently affecting the thin client market. It provides an evaluation of the top six vendors in the space based on their product offerings and overall vendor capabilities. http://www.infotech.com/research/it-vendor-landscape-thin-clients
	Vendor Landscape Storyboard: Thin Client	Info-Tech predicts that thin clients will continue to entice enterprises to switch away from traditional desktops in favor of increased security and cost benefits. http://www.infotech.com/research/it-vendor-landscape-storyboard-thin-client
	Thin Client Vendor Shortlist & Detailed Feature Analysis Tool	This tool allows enterprises to profile their thin client requirements and generate a rank-ordered vendor shortlist from a fixed list of vendors. Vendor profiles are based on Info-Tech's in-depth review of the thin client market. http://www.infotech.com/research/thin-client-vendor-shortlist-detailed-feature-analysis-tool
	Thin Client Vendor Demo Script	This template is designed to provide thin client vendors with a consistent set of instructions. This ensures equivalent product demonstrations to allow for an objective comparison of product features. http://www.infotech.com/research/thin-client-vendor-demo-script
	Thin Client Request for Proposal Template	Use this request for proposal (RFP) template to create a formal invitation for thin client vendors to submit a proposal meeting your thin client requirements. http://www.infotech.com/research/thin-client-request-for-proposal-template
Additional Resources		
	Disruptive Technology in 2014: Info-Tech's Analysis	Explore the technologies that will affect most organizations in the next five years. http://www.infotech.com/research/disruptive-technology-in-2014-info-tech-s-analysis
	The State of BlackBerry in 2014: Info-Tech's Analysis	Get an analyst's look at the state of BlackBerry as a mobile platform in 2014. http://www.infotech.com/research/the-state-of-blackberry-in-2014-info-tech-s-analysis
	Navigating Windows 8 Cheat Sheet	This cheat sheet helps users configure and personalize their desktop and start screen, as well as learn the basic mouse/touch gestures and keyboard shortcuts for Windows 8. http://www.infotech.com/research/it-navigating-windows-8-cheat-sheet

Type	Document	Description
	Develop a Desktop and Laptop Acquisition Strategy	When it comes to purchasing desktops and laptops, avoid buyer's remorse and negotiate the best deal. http://www.infotech.com/research/it-develop-a-desktop-and-laptop-acquisition-strategy
	Peeling the Virtualization Onion without Tears	Leading virtualization vendors such as VMware, Citrix, and Microsoft want to offer one-stop virtualization "from the desktop to the data center." These comprehensive approaches involve more than one kind of virtual abstraction. Understand what differentiates the various forms of virtualization. http://www.infotech.com/research/peeling-the-virtualization-onion-without-tears

Network & Communications: Network Management

Type	Document	Description
Blueprint: Build or Refresh the Wireless LAN		
	Build or Refresh the Wireless LAN	Your end users are embracing wireless and you can't afford to live in the past. They're demanding faster and more reliable wireless networks as they push the limits of your network's capacity with a growing number of devices per person. Follow Info-Tech's methodology to successfully implement your wireless LAN build or refresh. http://www.infotech.com/research/build-or-refresh-the-wireless-lan
	Storyboard: Build or Refresh the Wireless LAN	This storyboard will guide your organization through the process of conducting either a complete WLAN build, or a refresh of your existing WLAN, from initial requirements gathering, through metrics and network monitoring. http://www.infotech.com/research/storyboard-build-or-refresh-the-wireless-lan
	Wireless LAN Build or Refresh Business Case Template	Obtain the necessary stakeholder buy-in for the WLAN build or refresh using the Wireless LAN Build or Refresh Business Case Template. Provide a full project overview to all parties involved in the process. http://www.infotech.com/research/wireless-lan-build-or-refresh-business-case-template
	Wireless LAN Build or Refresh Implementation Plan Template	Use the WLAN implementation plan in order to break down the network build or refresh into digestible steps. The implementation task monitoring tool further breaks down the activities involved, creating a detailed timeline schedule. http://www.infotech.com/research/wireless-lan-build-or-refresh-implementation-plan-template
	Wireless LAN Requirements Gathering Tool	Use this tool to analyze the current business situation, and translate these business requirements into individual technical requirements for your WLAN build or refresh. http://www.infotech.com/research/wireless-lan-requirements-gathering-tool
	Wireless LAN RFP Scoring Tool	The RFP scoring tool will be the primary tool used in the vendor selection process. Score all WLAN vendors based on their ability to support your technical requirements at a cost-effective price. http://www.infotech.com/research/wireless-lan-rfp-scoring-tool
	Wireless LAN RFP Template	Use the RFP template to initiate the vendor review and selection process. Input data that best applies to your organization and its set of goals and objectives in order to source your WLAN vendor. http://www.infotech.com/research/wireless-lan-rfp-template

Type	Document	Description
	Wireless LAN Task Monitoring Tool	Moving from planning your WLAN build or refresh to actually executing the project is a big step. Ease the transition by breaking the process down into steps, and completing the task monitoring tool as you move along. http://www.infotech.com/research/wireless-lan-task-monitoring-tool
	Wireless LAN User Acceptable Use Policy	User satisfaction is a key driver for the WLAN build or refresh. It is crucial, however, that for the safety and security of your organization, a User Acceptable Use Policy is developed. http://www.infotech.com/research/wireless-lan-user-acceptable-use-policy
Blueprint: Outsource Network Management		
	Outsource Network Management	With the rise of virtualized, globalized 'as a service' computing, networks are an ever more critical utility, requiring rock solid availability, reliability, scalability, and performance. Outsourcing is a multi-faceted process, with an inherent level of associated risk. Without careful planning and due diligence regarding what to outsource, which vendor to use, and how to govern the outsourcing relationship, your organization will not succeed. Follow Info-Tech's methodology to outsource successfully. http://www.infotech.com/research/outsource-network-management
	Storyboard: Outsource Network Management	This storyboard will guide your organization through the process of outsourcing network management, from the initial evaluation of current state, through the vendor selection and signing process, and onwards to the monitoring and vendor relations component. http://www.infotech.com/research/storyboard-outsource-network-management
	Network Management Evaluation Tool	This tool will be used in order to determine whether or not outsourcing network management is the right decision for your organization. This tool provides a positioning analysis for your organization prior to moving forwards with the outsourcing process. http://www.infotech.com/research/network-management-evaluation-tool
	Network Management Internal Communication Plan Template	The internal communication plan ensures that stakeholders with relevant roles in the organization remain in frequent contact with one another, while creating a level of accountability for all communication-related tasks. http://www.infotech.com/research/network-management-internal-communication-plan-template
	Network Management Outsourcing Business Case Template	Use the Business Case template to develop a structure around the outsourcing process. This includes the requirements of your organization, the project duration, and the outsourcing project timeline. http://www.infotech.com/research/network-management-outsourcing-business-case-template
	Network Management Outsourcing RFP Scoring Tool	The RFP scoring tool will be the primary tool used in the vendor selection process. Additionally, the RFP will be used to select the partner vendor for the outsourcing contract. http://www.infotech.com/research/network-management-outsourcing-rfp-scoring-tool
	Network Management Outsourcing RFP Template	Use the RFP template in order to initiate the vendor review and selection process. Input data that best applies to your organization and its set of goals and objectives in order to source potential vendors that are a good fit. http://www.infotech.com/research/network-management-outsourcing-rfp-template

Type	Document	Description
	Network Management Outsourcing Roadmap Tool	Keep track of the outsourcing process using the roadmap tool. This tool will aid in keeping all stakeholders informed as to the current progress of the project, while also keeping relevant individuals involved in the process. http://www.infotech.com/research/network-management-outsourcing-roadmap-tool
	Network Management Vendor Communication Plan Template	The vendor communication plan is an integral component of the vendor management process. Use this tool to create a solidified structure that promotes open communication lines between your organization and the vendor. http://www.infotech.com/research/network-management-vendor-communication-plan-template
Blueprint: Build the Enterprise Access Network of the Future		
	Build the Enterprise Access Network of the Future	It's time to cut the blue cable and make the move to a primarily wireless access network. Look at upcoming network trends, and how they enhance the benefits of a wireless access network. Then learn how to implement a network that is more wireless than wired. http://www.infotech.com/research/it-build-the-enterprise-access-network-of-the-future
	Storyboard: Build the Enterprise Access Network of the Future	It's time to cut the blue cable and make the move to a primarily wireless access network. Look at upcoming network trends, and how they enhance the benefits of a wireless access network. Then learn how to implement a network that is more wireless than wired. http://www.infotech.com/research/it-storyboard-build-the-enterprise-access-network-of-the-future
	Wireless Access Network Readiness Assessment Tool	A wireless access network is indispensable in the modern business, but not every business needs to make it their primary access layer, nor are they prepared to. Use this tool to determine if your organization has the drivers and readiness to make the move to wireless. http://www.infotech.com/research/wireless-access-network-readiness-assessment-tool
Blueprint: Make the Network Invisible by Developing a World Class Network Management Function		
	Make the Network Invisible by Developing a World Class Network Management Function	Organizations have traditionally upgraded networks as necessary on an ad hoc basis, without thinking over the overarching architecture. Several years of impromptu upgrades have left many networks slow and unreliable. With the approach of business-ready SDN and network virtualization solutions, it is time for organizations to revisit their network architecture and network management practices. http://www.infotech.com/research/make-the-network-invisible-by-developing-a-world-class-network-management-function
	Storyboard: Make the Network Invisible by Developing a World Class Network Management Function	Organizations have traditionally upgraded networks as necessary on an ad-hoc basis, without considering the overarching architecture. Several years of impromptu upgrades have left many networks slow and unreliable. With the approach of business-ready SDN and network virtualization solutions, it is time for organizations to revisit their network architecture and network management practices. http://www.infotech.com/research/storyboard-make-the-network-invisible-by-developing-a-world-class-network-management-function

Blueprint: Modernize the Enterprise Network in Five Steps		
	Modernize the Enterprise Network in Five Steps	With the right appliances in place, network traffic and server usage can be optimized, leading to cost savings, efficiency gains, and high availability of applications to keep operations running smoothly. http://www.infotech.com/research/it-modernize-the-enterprise-network-in-five-steps
	Storyboard: Modernize the Enterprise Network in Five Steps	To stay relevant in IT, everything needs to evolve. While appliances have been added to the network, and aging hardware replaced, the network has done little to change as a whole. Now is the time to Modernize. http://www.infotech.com/research/it-storyboard-modernize-the-enterprise-network-in-five-steps
	Network Modernization Strategy Summary	This summary document allows organizations to summarize key aspects of their network modernization strategy and identify the highest priority network modernization goals. http://www.infotech.com/research/it-network-modernization-strategy-summary
	Network Modernization Strategy Document	The Network Modernization Strategy Document allows organizations to summarize their strategy from working through the Modernize the Enterprise Network in Five Steps Storyboard and Workshop. http://www.infotech.com/research/it-network-modernization-strategy-document
Blueprint: Craft a Converged Data Center Network Strategy		
	Craft a Converged Data Center Network Strategy	To support key consolidation, performance, and reliability objectives, enterprises must plan to evolve from disparate networks for compute and storage traffic to a converged data center networking infrastructure. This shift represents a major impact on technology planning and IT staffing and support. http://www.infotech.com/research/craft-a-converged-data-center-networking-strategy
	Storyboard: Craft a Converged Data Center Network Strategy	Now that 10G Ethernet is available at lower prices, data center technical staff is pushing it for day-to-day infrastructure. As with all new technologies, there is an optimal time for upgrading. Use this solution set to understand what needs to be considered when presented with requests for higher speed infrastructure. http://www.infotech.com/research/it-storyboard-craft-a-converged-data-center-network-strategy
	Data Center Convergence Assessment Tool	Embarking on a data center convergence strategy is a significant undertaking that first requires a clear understanding of timing and objectives. Understand the drivers behind network convergence to determine if it is a fit for the organization. http://www.infotech.com/research/it-data-center-convergence-assessment-tool
	Enterprise WLAN Evaluation & RFP Response Tool	For organizations that have issued a formal Request for Proposal (RFP) to evaluate Wireless LAN (WLAN) vendors, gathering and scoring the various responses can be difficult and time consuming. Use this tool to score and compare WLAN RFP vendor responses and review overall rankings and cost estimates. http://www.infotech.com/research/enterprise-wlan-evaluation-rfp-response-tool

	Network & Telephony Cost Reduction Assessment Tool	This tool is designed to help organizations determine top tactics for cost reduction within the network and telephony service area. After the questions have been completed, the tool will generate guidance on which cost-saving actions to take, the relative amount of savings from each action, the time frame to realize these savings, as well as potential challenges and ways to mitigate these challenges. http://www.infotech.com/research/network-telephony-cost-reduction-assessment-tool
	WAN Assessment Template	Use this template to guide you through the process of documenting and assessing WAN connectivity. http://www.infotech.com/research/wan-assessment-template
	WAN Connectivity Chart	Get up to speed on what's available on the WAN connectivity market using this information chart. http://www.infotech.com/research/wan-connectivity-chart
	Data Center Network Convergence Business Plan	Embarking on a data center convergence strategy is a significant undertaking that requires a thorough plan. This template will help you build a business plan for the enterprise as well as document business justifications and cautions for adopting a data center network convergence strategy. http://www.infotech.com/research/it-data-center-network-convergence-business-plan
	Enterprise WLAN RFP Template	Organizations embarking on the selection process for an Enterprise Wireless Local Area Network (WLAN) vendor may elect to issue a Request for Proposal (RFP) after determining their final selection criteria. Use this RFP template when soliciting vendor responses. http://www.infotech.com/research/enterprise-wlan-rfp-template
	WLAN Product Demonstration Script Template	Many enterprises will elect to have Wireless LAN (WLAN) vendors perform an on-site demonstration to help them better understand solution capabilities and constraints. This demonstration script template is designed to provide vendors with a consistent set of instructions for key scenarios. http://www.infotech.com/research/wlan-product-demonstration-script-template
	LAN Topology Template	This template is designed to provide guidance on what to record when documenting enterprise LAN topology. The template does not reflect any existing network design - it represents an entirely fictional network. Use the fictional LAN topology to build out the actual enterprise LAN topology. http://www.infotech.com/research/lan-topology-template
▶	Virtual Appliances Can Deliver Physical Appliance Performance	As every new generation of hardware brings performance boosts--especially faster processors, RAM, and solid state drives--virtual appliance vendors are taking advantage of these capabilities on host hardware. Vendors are now extracting the same level of performance expected of purpose-built solutions, giving you the opportunity to avoid buying a physical appliance. http://www.infotech.com/research/it-virtual-appliances-can-deliver-physical-appliance-performance
▶	vNetworks: Software VLANs without Borders	Virtual networks, or vNetworks, are coming on the scene to solve the problem of managing public cloud servers as a disparate network. When you can wrap your public cloud servers, rented dedicated servers, and on-premise servers into a single vNetwork, the promise of workload optimization and dynamic reallocation gets one step closer to reality. http://www.infotech.com/research/it-vnetworks-software-vlans-without-borders

▶	Managing IPv4 Depletion & Developing an IPv6 Strategy	IPv4 addressing is the technical underpinning of today's Internet, but the Internet of the future is already being built using IPv6. Organizations need to execute a network-centric IPv6 strategy over the next one to three years, supported by transitional techniques for managing the migration from IPv4 to IPv6 technologies on existing endpoints. http://www.infotech.com/research/managing-ipv4-depletion--developing-a-strategy-for-ipv6
Blueprint: Prepare for Software Defined Networking		
⚙	Prepare for Software Defined Networking	Organizations are finding it difficult to manage the configurations of physical devices in the network infrastructure and to optimize network utilization. Software defined networking (SDN) is a bleeding-edge architectural concept that is emerging in the networking landscape. It promises traffic flow optimization, external access and control of network resources, and virtualization and cloud compatibilities. This set is designed to define SDN, describe the impact of SDN over traditional networks, and prepare organizations looking to modernize networks through SDN. http://www.infotech.com/research/it-prepare-for-software-defined-networking-sdn
📄	Storyboard: Prepare for Software Defined Networking	Organizations are finding it difficult to manage the configurations of physical devices in the network infrastructure and optimize network utilization. Software defined networking (SDN) is an emerging architectural concept in the networking landscape. It promises traffic flow optimization, external access and control of network resources, and virtualization and Cloud compatibilities. This set defines SDN, describes the impact of SDN over traditional networks, and prepares organizations looking to modernize their network through SDN. http://www.infotech.com/research/it-storyboard-prepare-for-software-defined-networking-sdn
💼	Network Architect	The Network Architect's role is to develop and maintain the high-level design plan for the overall logical and technical network architecture. This individual will provide technical leadership and consulting across the organization from strategic decision making down to the project planning level. http://www.infotech.com/research/it-network-architect
▶	Video: Prepare for Software Defined Networking (SDN)	The advancements of networking technologies and hardware appliances have made enterprise networks complex and intricate. Organizations are looking for viable approaches to modernize their networks: here enters SDN as such an approach. http://www.infotech.com/research/it-video-prepare-for-software-defined-networking-sdn
Vendor Landscape: Data Center Networking		
⚙	Vendor Landscape: Data Center Networking	The growth of modern data centers came in the late 1990s during the dot.com era due to organizations requiring continuous operation and fast internet connectivity. Now, server and desktop virtualization are creating the need for faster core networks to keep up with demand for a quality end-user experience. http://www.infotech.com/research/it-vendor-landscape-data-center-networking
📄	Vendor Landscape Storyboard: Data Center Networking	Data Center Networking continues to evolve, taking advantage of faster connectivity and enabling private and public clouds, network virtualization, and Software Defined Networking. http://www.infotech.com/research/it-storyboard-data-center-networking-vendor-landscape

	Data Center Networking Vendor Shortlist Tool	Use this tool to generate a customized shortlist of Data Center Networking vendors based on your organization's preferred product features and vendor attributes. http://www.infotech.com/research/it-data-center-networking-vendor-shortlist-tool
Vendor Landscape: Enterprise Wired and Wireless LAN Access Infrastructure		
	Vendor Landscape: Enterprise Wired and Wireless LAN Access Infrastructure	The wireless LAN (WLAN) will soon take over as the primary network access layer, but some wired infrastructure is still required. Organizations are demanding an easily managed, single pane of glass solution. Use this Vendor Landscape to find your ideal combination of wired and wireless LAN. http://www.infotech.com/research/it-vendor-landscape-enterprise-wired-and-wireless-lan-access-infrastructure
	Vendor Landscape Storyboard: Enterprise Wired and Wireless LAN Access Infrastructure	The wireless LAN (WLAN) will soon take over as the primary network access layer, but some wired infrastructure is still required. Organizations are demanding an easily managed, single pane of glass solution. Use this Vendor Landscape to find your ideal combination of wired and wireless LAN. http://www.infotech.com/research/it-vendor-landscape-storyboard-enterprise-wired-and-wireless-lan-access-infrastructure
	Enterprise Wired and Wireless LAN Vendor Shortlist Tool	Use this tool to generate a customized shortlist of wired and wireless LAN vendors based on the importance your organization places on product features and vendor attributes. http://www.infotech.com/research/it-enterprise-wired-and-wireless-lan-vendor-shortlist-tool
Vendor Landscape: WAN Optimization		
	Vendor Landscape: WAN Optimization	Wide Area Network (WAN) optimization solutions are more flexible and efficient than ever before. Vendors have included availability for almost any scenario where reliable data transfer is vital or in situation where bandwidth is a scarce resource. http://www.infotech.com/research/it-vendor-landscape-wan-optimization
	Vendor Landscape Storyboard: WAN Optimization	The WAN optimization landscape has evolved dramatically in recent years. Technologies that were once cutting edge have become mainstream and vendors are now focusing their attention on the future. Mobility, virtualization, and cloud computing have become the new targets to strive for within WAN optimization solutions. http://www.infotech.com/research/it-vendor-landscape-storyboard-wan-optimization
	WAN Optimization Vendor Shortlist Tool	Use this tool to generate a customized shortlist of WAN Optimization vendors based on the importance your organization places on product features and vendor attributes. http://www.infotech.com/research/it-wan-optimization-vendor-shortlist-tool
Additional Resources		
	Select the Right Network Technology with Proven Best Practices	Inappropriate technology choices can easily cripple any small enterprise. Regardless of the IT organization's size, there is usually a network planning activity that selects the technology mix and network services. Unless those responsible for network planning utilize best practices, problems arise and valuable resources are wasted. http://www.infotech.com/research/select-the-right-network-technology-with-proven-best-practices

	How Telecom Expense Management Can Work for IT	Many corporate telecommunications bills contain erroneous charges caused by internal and/or carrier-related mismanagement. Telecom Expense Management (TEM) can help IT managers reduce all such costs. Consider the benefits of employing TEM software solutions and/or outsourcing telecom bill auditing to TEM service providers. http://www.infotech.com/research/how-telecom-expense-management-can-work-for-it
	Will In-Flight Wi-Fi Broadband Services Take Off?	Surfing the Internet, accessing e-mail, and utilizing VPN connections while flying the friendly skies could soon become a reality. In-flight broadband services using Wi-Fi and air-to-ground communication facilities are on the horizon. Enterprises should familiarize themselves with the new generation of broadband, non-satellite based services several airlines plan to offer. http://www.infotech.com/research/will-in-flight-wi-fi-broadband-services-take-off

Network & Communications: Voice & Video Management

Type	Document	Description
Blueprint: Make a Data-Driven Decision on Unified Communications		
	Make a Data-Driven Decision on Unified Communications	Survey stakeholders and users to validate IT's assumptions about what UC functions users really want and need. Build a business case on hard data in order to establish buy-in for UC decisions and gain approval. http://www.infotech.com/research/make-a-data-driven-decision-on-unified-communications
	Storyboard: Make a Data-Driven Decision on Unified Communications	Survey stakeholders and users to validate IT's assumptions about what UC functions users really want and need. Build a business case on hard data in order to establish buy-in to UC decisions and gain approval. http://www.infotech.com/research/storyboard-make-a-data-driven-decision-on-unified-communications
	Preliminary UC Needs Assessment	Survey stakeholders and users to validate IT's assumptions about what UC functions users really want and need. Build a business case on hard data in order to establish buy-in for UC decisions and gain approval. http://www.infotech.com/research/preliminary-uc-needs-assessment
	UC End-User Survey Questions	Survey stakeholders and users to validate IT's assumptions about what UC functions users really want and need. Build a business case on hard data in order to establish buy-in for UC decisions and gain approval. http://www.infotech.com/research/uc-end-user-survey-questions
	UC End-User Survey Report Mockup	Survey stakeholders and users to validate IT's assumptions about what UC functions users really want and need. Build a business case on hard data in order to establish buy-in for UC decisions and gain approval. http://www.infotech.com/research/uc-end-user-survey-report-mockup
	UC Stakeholder Interview Guide	Interview stakeholders to validate IT's assumptions about what UC functions users really want and need. Use these insights as you build a business case on hard data in order to establish buy-in for UC decisions and gain approval. http://www.infotech.com/research/uc-stakeholder-interview-guide
	Unified Communications Roadmap	Create a visual roadmap that highlights the alignment of the UC roadmap with business benefits, organizational goals, and strategic initiatives. http://www.infotech.com/research/unified-communications-roadmap

Blueprint: Develop a Telephony and Unified Communications Strategy		
	Develop a Telephony and Unified Communications Strategy	The project will help you make the case for a telephony and UC infrastructure that best meets the business' needs. Work through each step to develop a business case for an infrastructure that realizes a greater return on investment. http://www.infotech.com/research/develop-a-telephony-and-unified-communications-strategy
	Develop a Telephony and Unified Communications Strategy	The project will help you make the case for a telephony and UC infrastructure that best meets the business' needs. Work through each step to develop a business case for an infrastructure that realizes a greater return on investment. http://www.infotech.com/research/develop-a-telephony-and-unified-communications-strategy
	Storyboard: Develop a Telephony and Unified Communications Strategy	The project will help you make the case for a telephony and UC infrastructure that best meets the needs of the business. Work through each step to develop a compelling business case for an infrastructure that realize a greater ROI. http://www.infotech.com/research/storyboard-develop-a-telephony-and-unified-communications-strategy
	Stakeholder Planning Tool	Use this tool to create a prioritized list of people who are affected or can affect your project, and to determine how best to communicate with them during the project. http://www.infotech.com/research/stakeholder-planning-tool
	IPT and UC Business Value Assessment Tool	Gauge the total cost of ownership and return on investment of the infrastructure with the Business Value Assessment Tool. http://www.infotech.com/research/ipt-and-uc-business-value-assessment-tool
	Task Analysis Grid	Avoid the risk that stakeholders will “take a couple of days to get on the same page.” Draw the entire scope of the project and all the features of the first and future releases on the same page. http://www.infotech.com/research/task-analysis-grid
	Unified Communications Fit Assessment Tool	Unified Communications (UC) is an integrated approach to enhancing end user communications and accelerating key business processes. Enterprises exploring the potential benefits and challenges of this approach should leverage the UC Fit Assessment Tool to determine whether the time is right to pursue UC. http://www.infotech.com/research/unified-communications-fit-assessment-tool
	Unified Communications Use Case Template	An infrastructure refresh is an opportunity to examine how the business works, reduce complexity and latency, and increase automation. UC can eliminate communication-related “hot-spots” but only if you plan carefully. http://www.infotech.com/research/unified-communications-use-case-template
	Unified Communications Fit Assessment Tool	Unified Communications (UC) is an integrated approach to enhancing end user communications and accelerating key business processes. Enterprises exploring the potential benefits and challenges of this approach should leverage the UC Fit Assessment Tool to determine whether the time is right to pursue UC. http://www.infotech.com/research/unified-communications-fit-assessment-tool
Blueprint: Develop a Video Conferencing Strategy		
	Develop a Video Conferencing Strategy	Many organizations are looking to deploy a video conferencing solution in order to better meet business collaboration needs and address rising travel costs. This solution set will help you understand key aspects of video conferencing technologies, and accelerate the development and implementation of a video conferencing strategy. http://www.infotech.com/research/develop-a-video-conferencing-strategy

	Storyboard: Develop a Video Conferencing Strategy	Many organizations are looking to deploy a video conferencing solution in order to better meet business collaboration needs and address rising travel costs. This solution set will help you understand key aspects of video conferencing technologies, and accelerate the development and implementation of a video conferencing strategy. http://www.infotech.com/research/it-storyboard-develop-a-video-conferencing-strategy
	Video Conferencing Financial Calculator	Preparing a business proposal for a video conferencing solution can be a challenge for IT leaders due to the scope and scale of the project, as most organizations require formal justification to move forward. Leverage this financial calculator to save time and effort when building a financial analysis of the costs and benefits of video conferencing for inclusion in the sample proposal. http://www.infotech.com/research/it-video-conferencing-financial-calculator
	Video Conferencing RFP Response Evaluation Tool	For organizations that have issued a formal Request for Proposal (RFP) to evaluate video conferencing vendors, gathering and scoring the various responses can be difficult and time consuming. Use this tool to evaluate and compare RFP vendor responses, as well as to review overall rankings and cost estimates. http://www.infotech.com/research/it-video-conferencing-rfp-response-evaluation-tool
	Video Conferencing vs. Travel Cost Analysis Tool	Given advances in video conferencing technology, it may be time to consider virtual meetings as a more efficient alternative to travel. This tool enables enterprises to evaluate their current meeting travel costs, and gauge the potential hard and soft benefits associated with a video conferencing investment. http://www.infotech.com/research/it-video-conferencing-vs-travel-cost-analysis-tool
	Video Conferencing Solution RFP Template	Organizations embarking on the selection process for a video conferencing vendor may elect to issue a Request for Proposal (RFP) after determining their final selection criteria. Use this RFP template when soliciting vendor responses. http://www.infotech.com/research/it-video-conferencing-solution-rfp-template
	Video Conferencing Sample Proposal	Preparing a business proposal for a video conferencing solution can be a challenge for IT leaders because most organizations require formal justification to move forward, due to the scope and scale of the project. Leverage this sample proposal to save time and effort in the development of a formal document. http://www.infotech.com/research/it-video-conferencing-sample-proposal
	Video Conferencing Product Demonstration Script	Many enterprises will elect to have video conferencing vendors perform an on-site demonstration to help them better understand solution capabilities and constraints. This demonstration script template is designed to provide vendors with a consistent set of instructions for key scenarios. http://www.infotech.com/research/it-video-conferencing-product-demonstration-script
Blueprint: Inventory and Optimize the Telecom Environment		
	Inventory and Optimize the Telecom Environment	This solution set will help IT leaders perform a complete telecommunications inventory that can be used to optimize the ongoing delivery of voice and data services to the enterprise. http://www.infotech.com/research/inventory-my-telecom-environment

	Storyboard: Inventory and Optimize the Telecom Environment	Multi-site enterprises are commonly managing environments with different types of voice and data connectivity, often sourced from multiple service providers. This solution set will help IT leaders perform a full telecom inventory that can be used to optimize the ongoing delivery of voice and data services for the enterprise. http://www.infotech.com/research/it-storyboard-inventory-and-optimize-the-telecom-environment
	Telecom Inventory Workbook	Multi-site enterprises are commonly managing environments with different types of voice and data connectivity, often sourced from multiple service providers. Use this tool to inventory telecom services, physical assets, monthly invoices, as well as vendors and contracts. http://www.infotech.com/research/it-telecom-inventory-workbook
Blueprint: Develop a Unified Communications Strategy		
	Develop a Unified Communications Strategy	This solution set will bring focus to the key UC opportunities and challenges that you must consider and help you find the path to success. http://www.infotech.com/research/develop-a-unified-communications-strategy
Blueprint: Make the Case for IP Telephony		
	Make the Case for IP Telephony	Organizations must explore IP-based telephony solutions as legacy PBX equipment expires and support options disappear. http://www.infotech.com/research/make-the-case-for-ip-telephony
	Cisco Collaboration Summit 2011 Wrap-Up	Cisco held its annual Collaboration Summit in Miami in November 2011. Cisco executives and subject matter experts, partners, customers, consultants, and industry analysts came together to hear updates and strategies from Cisco on its communication and collaboration technologies, and to share perspectives on current and future capabilities. http://www.infotech.com/research/it-cisco-collaboration-summit-2011-wrap-up
Blueprint: Optimize UC to Maximize Business ROI		
	Optimize UC to Maximize Business ROI	Unified Communications (UC) is an integrated approach to enhancing end-user communications and accelerating key business processes. Enterprises looking to maximize the return on UC investments need to focus on business requirements and execute UC projects iteratively and incrementally as part of an overall UC strategy to achieve the appropriate level of Communications-Enabled Business Process maturity. http://www.infotech.com/research/it-optimize-uc-to-maximize-business-roi
	Storyboard: Optimize UC to Maximize Business ROI	Unified Communications (UC) is an integrated approach to enhancing end-user communications and accelerating key business processes. Enterprises looking to maximize the return on UC investments need to focus on business requirements and execute UC projects iteratively and incrementally as part of an overall UC strategy to achieve the appropriate level of Communications-Enabled Business Process maturity. http://www.infotech.com/research/it-storyboard-optimize-uc-to-maximize-business-roi

	Unified Communications Financial Calculator	Unified Communications (UC) is an integrated approach to enhancing end-user communications and accelerating key business processes. Enterprises embarking on initial or follow-on UC implementations should leverage the UC Financial Calculator to detail the costs and benefits of the proposed implementation with a focus on Total Cost of Ownership (TCO) and Return on Investment (ROI). http://www.infotech.com/research/it-unified-communications-financial-calculator
	Unified Communications Optimization Business Proposal	Unified Communications (UC) is an integrated approach to enhancing end-user communications and accelerating key business processes. Enterprises embarking on initial or follow-on UC implementations should leverage the UC Optimization Business Proposal template to consolidate information about the proposed implementation and accelerate the project approval process. http://www.infotech.com/research/it-unified-communications-optimization-business-proposal
	Optimize Unified Communications	Unified Communications (UC) is an integrated approach to enhancing end-user communications and accelerating key business processes. Enterprises looking to maximize the return on UC investments need to focus on business requirements and execute UC projects iteratively and incrementally as part of an overall UC strategy. http://www.infotech.com/research/it-optimize-unified-communications
	Contract Management Tool	Use the Contract Management Tool to track location, status, and expiry dates of ongoing contracts. The tool provides advance warning of checkpoint dates for timely contract renewal decisions. http://www.infotech.com/research/contract-management-tool
	Telecom Inventory Template	Capturing and assembling site-by-site voice and data connectivity in a central repository will put the enterprise in the best position to review overall capacity and identify any costly exceptions. Use this template to get a start on information gathering activities. http://www.infotech.com/research/telecom-inventory-template
Blueprint: Shift the Budget From IT Maintenance Toward IT Enhancements		
	Reduce Telecom Expenses	This solution set will help organizations understand where to focus their telecom cost reduction efforts and how to develop a practice for ongoing telecom expense management. http://www.infotech.com/research/reduce-my-ongoing-telephony-expenses
Vendor Landscape: IP Telephony & Unified Communications		
	Vendor Landscape: IP Telephony & Unified Communications	While core telephony remains important, many organizations are looking at Unified Communications (UC) technologies to enhance productivity and improve collaborations. http://www.infotech.com/research/it-vendor-landscape-ip-telephony-unified-communications
	Vendor Landscape Storyboard: IP Telephony & Unified Communications	Cisco led the pack with a well-rounded IP Telephony (IPT) and Unified Communications (UC) solution, but vendor selection isn't just about the leader. Competitors provide legitimate alternatives based on the organization's specific functional requirements. http://www.infotech.com/research/it-vendor-landscape-storyboard-ip-telephony-unified-communications

	IP Telephony & Unified Communications Vendor Shortlist Tool	This tool allows enterprises to generate a customized shortlist of IP Telephony (IPT) and Unified Communications (UC) vendors based on required capabilities and future requirements. http://www.infotech.com/research/it-ip-telephony-unified-communications-vendor-shortlist-tool
Vendor Landscape: Video Conferencing		
	Vendor Landscape: Video Conferencing	Many organizations are looking to deploy a video conferencing (VC) solution in order to better meet business collaboration needs and address rising travel costs. This solution set will help you understand key product selection criteria and the primary strengths and challenges of the leading players. http://www.infotech.com/research/vendor-landscape-video-conferencing
	Vendor Landscape Storyboard: Video Conferencing	Many organizations are looking to deploy a video conferencing solution in order to better meet business collaboration needs and address rising travel costs. This solution set will help you understand selection criteria and give insight into the future of video conferencing. http://www.infotech.com/research/vendor-landscape-storyboard-video-conferencing
	Video Conferencing Vendor Shortlist Tool	This tool allows enterprises to generate a customized shortlist of video conferencing vendors based the needs of the organization. Organizations will be able to prioritize weighting for evaluation criteria and product score to help them identify vendors that will best meet their needs. http://www.infotech.com/research/it-video-conferencing-vendor-shortlist-tool
Additional Resources		
	How Many Phone Lines Do You Need?	Determining the number of phone lines required for a facility can be a daunting task for IT leaders that have recently taken on telecom responsibilities. Planners should leverage available data sources and established traffic analysis methods to help estimate the optimal number of voice trunks to provision. http://www.infotech.com/research/how-many-phone-lines-do-you-need
	Virtual Call Center Agents Can Use IPT, But Not Over the Public Internet	Using home-based or virtual call center agents to augment or replace traditional brick-and-mortar call center agents seems like a great idea. Virtual agents can offer many benefits, including increased scheduling flexibility, reduced infrastructure costs, and a greatly expanded pool of potential candidates to choose from, but IP Telephony (IPT) over the public Internet is not up to the task. http://www.infotech.com/research/virtual-call-center-agents-can-use-ipt-but-not-over-the-public-internet

Operations Research

Operations: Availability & Performance Management

Type	Document	Description
Blueprint: Decide if Microsoft System Center 2012 is Right for the Enterprise		
	Decide if Microsoft System Center 2012 is Right for the Enterprise	System Center 2012, a unified systems management platform, provides a single solution for managing hypervisors, physical resources, and applications. http://www.infotech.com/research/decide-if-microsoft-system-center-2012-is-right-for-the-enterprise

Type	Document	Description
	Storyboard: Decide if Microsoft System Center 2012 is Right for the Enterprise	Microsoft System Center 2012 is Microsoft's attempt at providing a solution that is capable of managing all IT environments and growing with organizations as their data centers evolve over time. http://www.infotech.com/research/it-storyboard-decide-if-microsoft-system-center-2012-is-right-for-the-enterprise
	Microsoft System Center 2012 Cost Calculator	Estimate the cost of licensing Microsoft System Center 2012 in your environment. http://www.infotech.com/research/it-microsoft-system-center-2012-cost-calculator
	System Center 2012	Get an overview of Microsoft's System Center 2012, some of the major licensing changes that have occurred to System Center, and a few words of advice for those considering purchasing this product. http://www.infotech.com/research/it-system-center-2012
Blueprint: Develop a Data Center Infrastructure SLA		
	Develop a Data Center Infrastructure SLA	Service Level Agreements (SLA) are the intersection between the provisioning of bulk data center services at lowest cost, and the measurable (and unmeasurable) business service expectations. Data centers are structured to provide lowest-cost, reliable infrastructure services, repeatedly. http://www.infotech.com/research/develop-a-data-center-service-level-agreement
	Storyboard: Develop a Data Center Infrastructure SLA	60% of IT departments do not have a formal data center SLA, but recognize that the business has informal service expectations. Organization's that measure, monitor, and report on infrastructure service level metrics are more successful at managing data center infrastructure service levels. The SLA development and management process will help IT to better manage service levels - whether or not IT chooses to formally document the data center SLA with the business. http://www.infotech.com/research/it-storyboard-develop-a-data-center-infrastructure-sla
	Data Center Infrastructure Service Level Monitoring Tool	Formally or informally, the business has expectations with regards to the service levels of the data center infrastructure. To begin the process of improving delivery of IT's services and transactions to the business, use this tool to help identify, monitor, and report on relevant metrics for critical components of the infrastructure. http://www.infotech.com/research/data-center-infrastructure-service-level-monitoring-tool
	Data Center Infrastructure Service Level Agreement Template	Committing resources to establishing a set of formal procedures for monitoring and reporting on data center infrastructure service levels is a big investment. This SLA template will help you to document target service levels for the business if a formal SLA is necessary for your organization, to fully capitalize on that initial investment. http://www.infotech.com/research/data-center-infrastructure-service-level-agreement-template
	Data Center Infrastructure Service Level Agreement Template	Committing resources to establishing a set of formal procedures for monitoring and reporting on data center infrastructure service levels is a big investment. This SLA template will help you to document target service levels for the business if a formal SLA is necessary for your organization, to fully capitalize on that initial investment. http://www.infotech.com/research/data-center-infrastructure-service-level-agreement-template

Blueprint: Take Control of Infrastructure Metrics		
	Take Control of Infrastructure Metrics	Many organizations collect metrics to validate they are keeping the lights on and the infrastructure running. But the Infrastructure Managers who are benefiting the most are taking steps to ensure they are getting the right metrics to help them make decisions, manage costs, and plan for change. http://www.infotech.com/research/it-take-control-of-infrastructure-metrics
	Storyboard: Take Control of Infrastructure Metrics	Many organizations collect metrics to validate they are keeping the lights on and the infrastructure running. But the Infrastructure Managers who are benefiting the most are taking steps to ensure they are getting the right metrics to help them make decisions, manage costs, and plan for change. http://www.infotech.com/research/it-storyboard-take-control-of-infrastructure-metrics
	Metrics Definition Template	This template provides the means to track data on each metric to enable full lifecycle management. The definitions should be linked to a calendar for review frequency to ensure metrics remain relevant as the technology environment changes and as business needs change. http://www.infotech.com/research/it-metrics-definition-template
	Infrastructure Metrics Tracking and Reporting Tool	Metrics are often collected using several tools and coming from several sources. Use this tool to centralize key metrics tracking and reporting. http://www.infotech.com/research/it-infrastructure-metrics-tracking-and-reporting-tool
	Case Study: Washington Mutual	This case study showcases an organization that made better use of metrics by closely examining and eliminating more than 1500 metrics, making data more accurate and relevant to the running of the business, and enabling a savings of $2.7 million. http://www.infotech.com/research/it-case-study-washington-mutual
	New Project Checklist for the Infrastructure Manager	Infrastructure Managers are often blindsided by upcoming projects that were not accurately scoped in terms of impact on the infrastructure. Use this checklist to ensure you have the necessary details to plan changes to the infrastructure and resourcing to meet the needs of the new project. http://www.infotech.com/research/it-new-project-checklist-for-the-infrastructure-manager
	Quarterly Metrics Review with the CIO	Establish quarterly metric reviews with your CIO to support capacity planning and management. Use this template to create a metrics report for your CIO. http://www.infotech.com/research/it-quarterly-metrics-review-with-the-cio
	Weekly Metrics Review with Staff	As an Infrastructure Manager, your time is scarce. Use this template to ensure that weekly metrics reviews are isolated to those facts you need to know about - SLA breaches, anomalies, and potential risks. http://www.infotech.com/research/it-weekly-metrics-review-with-staff
	Take Control of Your Infrastructure Metrics	Many organizations collect metrics to validate they are keeping the lights on and the infrastructure running. But the Infrastructure Managers who are benefiting the most are taking steps to ensure they are getting the right metrics to help them make decisions, manage costs, and plan for change. http://www.infotech.com/research/it-take-control-of-your-infrastructure-metrics
Use Metrics for Competitive Advantage		
	Systems Management Vendor Shortlist Tool	Use this tool to identify leading vendors in the market and generate a customized shortlist of Systems Management vendors based on your key priorities. http://www.infotech.com/research/it-systems-management-vendor-shortlist-tool

Operations: DR and Business Continuity

Type	Document	Description
Blueprint: Create a Right-Sized Disaster Recovery Plan		
	Create a Right-Sized Disaster Recovery Plan	Creating an effective right-sized DRP starts with discovering current capabilities, defining business requirements, and closing the gap in service continuity capability. http://www.infotech.com/research/create-a-right-sized-disaster-recovery-plan
	Storyboard: Create a Right-Sized Disaster Recovery Plan	Determine appropriate recovery time objects based on the impact of downtime. http://www.infotech.com/research/storyboard-create-a-right-sized-disaster-recovery-plan
	DRP Business Impact Analysis Tool	Document your step-by-step incident response plan, including recovery timeline and task owners. http://www.infotech.com/research/drp-business-impact-analysis-tool
	DRP Incident Response Management Tool	Define roles and responsibilities, project objectives, and key milestones. http://www.infotech.com/research/drp-incident-response-management-tool
	DRP Pilot Project Charter Template	Summarize and present DRP pilot results to the executive team. http://www.infotech.com/research/drp-pilot-project-charter-template
	DRP Pilot Results Presentation Templates	Prioritize projects to close gaps between current and desired DR capability. http://www.infotech.com/research/drp-pilot-results-presentation-templates
	DRP Project Roadmap Tool	Assess whether critical vendors meet your DR requirements. http://www.infotech.com/research/drp-project-roadmap-tool
	DRP Vendor Evaluation Questionnaire and Tool	Record DRP information including metrics and contact information. http://www.infotech.com/research/drp-vendor-evaluation-questionnaire-and-tool
	DRP Workbook	Review and modify severity definitions and escalation rules to determine when DR takes over from service management. http://www.infotech.com/research/drp-workbook
	Severity Definitions and Escalation Rules Template	Close the gap between your DR capabilities and service continuity requirements. http://www.infotech.com/research/severity-definitions-and-escalation-rules-template
Blueprint: Implement Crisis Management Best Practices		
	Implement Crisis Management Best Practices	An effective crisis management plan provides a framework for responding to any crisis, from health and safety incidents to business disruptions to reputational damage. http://www.infotech.com/research/implement-crisis-management-best-practices
	Storyboard: Implement Crisis Management Best Practices	Implement an effective crisis response plan to minimize the impact on business continuity, reputation, and profitability. http://www.infotech.com/research/storyboard-implement-crisis-management-best-practices
	Crisis Communication Guidelines and Templates	Develop a crisis communication plan and pre-planned communications. http://www.infotech.com/research/crisis-communication-guidelines-and-templates
	Crisis Management Plan Workbook	Centralize crisis management reference information including metrics and contacts in the CMP Workbook. http://www.infotech.com/research/crisis-management-plan-workbook

Type	Document	Description
	Crisis Management Risk Prioritization Workbook	Identify and prioritize potential crises to enable crisis management pre-planning. http://www.infotech.com/research/crisis-management-risk-prioritization-workbook
	Emergency Response Plan Checklist	Use this document as a guideline to develop or review your emergency response plans. http://www.infotech.com/research/emergency-response-plan-checklist
	Example Crisis Management Process Flowcharts	Leverage Info-Tech's examples to document your crisis management processes. http://www.infotech.com/research/example-crisis-management-process-flowcharts
	Organizational Learning Guide	Identify lessons learned from a crisis or crisis management plan testing exercise. http://www.infotech.com/research/organizational-learning-guide
	Situational Assessment Checklist and Metrics Tracking Tool	Track your crisis response steps as well as crisis-specific metrics that will assist crisis evaluation. http://www.infotech.com/research/situational-assessment-checklist-and-metrics-tracking-tool
Blueprint: Review Continuity Plans to Deal with the Threat of Ebola		
	Review Continuity Plans to Deal with the Threat of Ebola	The Ebola Briefing and the Executive Presentation provide useful information on how to get the facts about Ebola, understand the risks to employees and your supply chain, and make a plan to ensure business continuity. http://www.infotech.com/research/review-continuity-plans-to-deal-with-the-threat-of-ebola
	Ebola Briefing: Executive Presentation	This executive presentation provides useful information on how to get the facts about Ebola, understand the risks to employees and your supply chain, and make a plan to ensure business continuity. http://www.infotech.com/research/ebola-briefing-executive-presentation
	Ebola Briefing	The Ebola Briefing is intended to provide you with the necessary information you need to analyze and mitigate the risks that the recent outbreak of Ebola Virus Disease (EVD) in West Africa pose to your organization. http://www.infotech.com/research/ebola-briefing
Blueprint: Create Visual SOP Documents that Drive Process Optimization, Not Just Peace of Mind		
	Create Visual SOP Documents that Drive Process Optimization, Not Just Peace of Mind	Visual-based documents - flowcharts, checklists, and diagrams - are much more effective than traditional text-heavy SOPs. Visual documents are easier to absorb, quicker to create, and more likely to be updated because they are easier to maintain. http://www.infotech.com/research/it-create-visual-sop-documents-that-drive-process-optimization-not-just-peace-of-mind
	Storyboard: Create Visual SOP Documents That Drive Process Optimization, Not Just Peace of Mind	Make SOPs work for you with visual documents that are easier to create and more effective for process management and optimization. http://www.infotech.com/research/it-storyboard-create-visual-sop-documents-that-drive-process-optimization-not-just-peace-of-mind
	Incident Response and Recovery Process Flows - DRP Example	Use flowcharts and checklists to create effective SOP documents. http://www.infotech.com/research/it-incident-response-and-recovery-process-flows-drp-example
	Network Backup for Atlanta Data Center - Backups Example	Use flowcharts and checklists to create effective SOP documents. http://www.infotech.com/research/it-network-backup-for-atlanta-data-center-backups-example

Type	Document	Description
	Employee Termination Process Checklist - IT Security Example	Use flowcharts and checklists to create effective SOP documents. http://www.infotech.com/research/it-employee-termination-process-checklist-it-security-example
	Document Management Checklist	Use flowcharts and checklists to create effective SOP documents. http://www.infotech.com/research/it-document-management-checklist
	Document Information Block	Use flowcharts and checklists to create effective SOP documents. http://www.infotech.com/research/it-document-information-block
	Application Development Process - AppDev Example	Use flowcharts and checklists to create effective SOP documents. http://www.infotech.com/research/it-application-development-process-appdev-example
	Sales Process for New Clients - Sales Example	Use flowcharts and checklists to create effective SOP documents. http://www.infotech.com/research/it-sales-process-for-new-clients-sales-example
	Incident and Service Management Procedures - Service Desk Example	Use flowcharts and checklists to create effective SOP documents. http://www.infotech.com/research/it-incident-and-service-management-procedures-service-desk-example
	Standard Operating Procedures Workbook	Make SOPs work for you with visual documents that are easier to create and more effective for process management and optimization. http://www.infotech.com/research/it-standard-operating-procedures-workbook
Blueprint: Develop a Backup Software Strategy		
	Develop a Backup Software Strategy	When looking at backup software vendors, don't be distracted by flashy new features. Backup software should really be called restore software. http://www.infotech.com/research/it-select-the-right-enterprise-backup-software
	Storyboard: Develop a Backup Software Strategy	Backup software is about meeting restore objectives while mitigating cost. Regular evaluation of current and competing backup software is critical as new challenges emerge from server virtualization to exploding data needs. http://www.infotech.com/research/it-storyboard-select-the-right-enterprise-backup-software
	Backup Software RFP Scoring Tool	For organizations that have issued a formal Request for Proposal (RFP) to evaluate backup software vendors, gathering and scoring the various responses can be difficult and time consuming. This tool enables enterprises to evaluate and compare the results of a backup software RFP process quickly and easily. http://www.infotech.com/research/it-backup-software-rfp-scoring-tool
	Backup Software RFP Template	Organizations embarking on the selection process for backup software may select to issue a Request for Proposal (RFP) after determining their final selection criteria. http://www.infotech.com/research/it-backup-software-rfp-template
	Backup Software Vendor Demonstration Script	This template is designed to provide backup software vendors with a consistent set of instructions, ensuring an objective comparison of product features, all while evaluating ease-of-use from a user and IT perspective. This template is pre-built with five common scenarios to leverage. http://www.infotech.com/research/it-backup-software-vendor-demonstration-script

Type	Document	Description
▶	Enterprise Backup Software Select	Recent developments, such as increased virtualization and expanding storage capacity requirements, are changing backup infrastructure and creating new challenges. Understand vendor capabilities to meet availability and restore objectives while minimizing costs. http://www.infotech.com/research/it-enterprise-backup-software-select
Blueprint: Develop a Business Continuity Plan		
	Develop a Business Continuity Plan	Building an enterprise Business Continuity Plan means understanding business functions and implementing measures to ensure that they can continue to operate in the event of an outage or disaster, regardless of the presence of IT capabilities. http://www.infotech.com/research/it-develop-a-business-continuity-plan
	Storyboard: Develop a Business Continuity Plan	Summarize and present BCP pilot results to the executive team. http://www.infotech.com/research/storyboard-develop-a-business-continuity-plan
	Business Continuity Policy Template	Set expectations for business continuity management including responsibilities for each business unit and executive commitment to supporting business continuity efforts. http://www.infotech.com/research/business-continuity-policy-template
	Business Continuity Plan Pilot Project Charter Template	Clarify IT vs. business roles, project objectives, and key milestones. http://www.infotech.com/research/business-continuity-plan-pilot-project-charter-template
	Business Unit Business Continuity Plan Prioritization Tool	Determine the order that business units should take on BCP development, based on impact on core operations. http://www.infotech.com/research/business-unit-business-continuity-plan-prioritization-tool
	Business Continuity Workbook	Organize information required for business continuity management in this workbook, and track BCP status. http://www.infotech.com/research/business-continuity-workbook
	Business Continuity Business Impact Analysis Tool	Determine appropriate recovery time objects based on the impact of downtime. http://www.infotech.com/research/business-continuity-business-impact-analysis-tool
	Business Continuity Project Roadmap Tool	Prioritize projects to close gaps between current and desired business continuity capability. http://www.infotech.com/research/business-continuity-project-roadmap-tool
	Business Continuity Incident Response Management Tool	Define a procedure to resume business unit processes after an incident, within the desired recovery timeline. http://www.infotech.com/research/business-continuity-incident-response-management-tool
	Business Continuity Plan Pilot Results Presentation Template	Summarize and present BCP pilot results to the executive team. http://www.infotech.com/research/business-continuity-plan-pilot-results-presentation-template
▶	Risk and Business Impact Analysis Worksheet	Risk and Business Impact Analysis (RBIA) is about assigning the right resources to the most critical areas of the business in the event of a disaster. This Excel-based tool is designed to assist IT professionals in performing the RBIA exercise as a fundamental part of the Disaster Recovery Plan (DRP) process. http://www.infotech.com/research/risk-and-business-impact-analysis-worksheet

Blueprint: Make Disaster Recovery Actionable		
	Make Disaster Recovery Actionable	This solution set will help clients ensure that, when required, the enterprise can put its DR plan into action. http://www.infotech.com/research/make-sure-the-drp-is-ready-for-a-disaster
	Storyboard: Make Disaster Recovery Actionable	To ensure that the newly minted enterprise Disaster Recovery Plan (DRP) does not become shelfware, a regiment of staffing, training and testing must be put into place. This presentation explores additional tasks that the enterprise must take on, once the DRP is complete, to ensure it can withstand a disaster. http://www.infotech.com/research/storyboard-enabling-enterprise-disaster-recovery
	DRP Test Schedule Worksheet	Disaster Recovery (DR) testing is an essential component of any comprehensive DR plan as testing is what ensures that the plan is appropriate, accurate, and contains no errors or omissions. http://www.infotech.com/research/it-drp-test-schedule-worksheet
	DRP Test Worksheet	Don't wait until disaster recovery (DR) is invoked to discover weaknesses in DR processes. Run a full test of the enterprise DR plan to uncover flaws before an event knocks out IT systems for good. http://www.infotech.com/research/drp-test-worksheet
	DR Team Build Sheet	Recovering from a disaster cannot occur without having key people in place to bring system, equipment, and services back online. Use this worksheet to identify team members, record contact information, and delineate responsibilities. ttp://www.infotech.com/research/drp-team-build-sheet
	Bring the DRP to Life: Make the Plan Actionable	Building a solid Disaster Recovery Plan (DRP) is only half of the battle; the plan isn't going to operate itself. This videocast explores additional tasks that the enterprise must engage in once the plan is complete. Ensure your enterprise can withstand an actual disaster. http://www.infotech.com/research/bring-the-drp-to-life-make-the-plan-actionable
	Controls Maturity Assessment and Roadmap Tool	There are numerous areas on which organizations can focus to improve controls and manage internal threats for compliance or risk mitigation purposes. To improve, organizations need to gauge their current level of maturity and prioritize their internal control initiatives. http://www.infotech.com/research/it-controls-maturity-assessment-and-roadmap-tool
	System Access Tracking Tool	A well governed access management process requires formal management approval for access to systems and physical access points. Use this tool to track current access to systems and other access points in the organization. http://www.infotech.com/research/it-system-access-tracking-tool
	System/Network Administrator Code of Conduct	The purpose of the system/network administrator code of conduct is to outline responsibilities, guidelines, and standards of behavior for all individuals who function as system/network administrators. http://www.infotech.com/research/it-systemnetwork-administrator-code-of-conduct
	Access Request Form	A well governed access management process requires formalized management approval for access to systems and physical access points. Use this tool to develop a formal process for employee access requests. http://www.infotech.com/research/it-access-request-form

Blueprint: Business Continuity Planning		
	Business Continuity Planning	Focus on implementing a structured and repeatable process that can be applied to one business unit at a time to avoid BCP from becoming an overwhelming project. http://www.infotech.com/research/business-continuity-planning
Blueprint: Optimize Backup Operations with a Recovery Services Plan		
	Optimize Backup Operations with a Recovery Services Plan	Data stands among any organization's most valuable assets. Yet, many organizations leave that data under-protected by not investing effectively in their backup solution. This solution set describes how organizations can better understand the value of their backup environment, while emphasizing the ways in which a focus on people and processes can help get more out of existing infrastructure without a costly expenditure. http://www.infotech.com/research/optimize-backup-operations-with-a-recovery-services-plan
Blueprint: Document and Maintain the Disaster Recovery Plan		
	Document and Maintain the Disaster Recovery Plan	This solution set will help you through the process of creating your Disaster Recovery Plan (DRP) and help you maintain the documents. http://www.infotech.com/research/document-the-dr-plan
	Storyboard: Document and Maintain the Disaster Recovery Plan	Creating a Disaster Recovery Plan (DRP) can take months. After all that effort, too many DRPs would actually be ineffective in a real crisis. http://www.infotech.com/research/storyboard-document-the-disaster-recovery-plan-now
	DRP Publishing and Document Management Solution Evaluation Tool	Evaluate the effectiveness of your current Disaster Recovery Plan (DRP) publishing and document management solution, and compare alternatives. http://www.infotech.com/research/it-drp-publishing-and-document-management-solution-evaluation-tool
	SOP Templates and Examples	Use flowcharts and checklists to create effective SOP documents. http://www.infotech.com/research/it-sop-templates-and-examples
	Selecting Backup Media	Small enterprises selecting backup media must consider enterprise needs including RTO and RPO, as well as media limitations in capacity, life-span, reliability, availability, off-site suitability, and cost. Use this tool, informed by enterprise expectations for the backup system, to guide backup media choices. http://www.infotech.com/research/selecting-backup-media
	DRP Workshop Summary for a Mid-Sized Insurance Company	The existing Business Continuity Plan lacked the specific details of a step-by-step incident response plan, and failed to account for all potential disaster scenarios. IT needed direction and focus to work through those details and create a workable disaster recovery plan. http://www.infotech.com/research/it-drp-workshop-summary-for-a-mid-sized-insurance-company
	Right-Sizing DRP Case Study of a State Government Agency	Increasing complexity within the environment, with competing priorities within the organization, made it challenging to create an actionable DRP or even to know where to start. http://www.infotech.com/research/right-sizing-drp-case-study-of-a-state-government-agency
	Checklist SOP Template	Use checklists to streamline step-by-step procedures. Checklists are ideal when writing for experienced staff who just need a reminder of what to do, not how to do it. http://www.infotech.com/research/it-checklist-sop-template
	Flowchart SOP Template (DRP)	Flowcharts provide an at-a-glance view, ideal for disaster scenarios where pressure is high and rapid upward communication is critical. Similarly, flowcharts are also effective for capturing a high-level view of day-to-day Standard Operating Procedures (SOPs). http://www.infotech.com/research/it-flowchart-sop-template-drp

	Disaster Recovery Plan Template	If you haven't created a Disaster Recovery Plan (DRP) in the past, chances are you may not know what one should look like, or what should be included. This template presents a full, editable DRP template; use this template to document your organization's disaster recovery capabilities. http://www.infotech.com/research/disaster-recovery-plan-template
	Small Enterprise DRP Testing Worksheet	No DRP is complete without a full test of its capabilities and the timely identification of potential shortfalls. This tool helps DRP project managers to capture the elements involved with DRP and uncover flaws before an event knocks out IT systems. http://www.infotech.com/research/drp-testing-worksheet
	Security Standards Policy Table of Contents	The foundation for addressing security threats is a clear set of security policies and standards. Use the "Security Standards Policy Table of Contents" template as a guide to setting up effective enterprise security policies. http://www.infotech.com/research/security-standards-policy-table-of-contents
	Non-Terrestrial WAN Redundancy Assessment	Use Info-Tech's "Non-Terrestrial WAN Redundancy Assessment" to determine which non-terrestrial WAN connectivity technology best suits the needs of the enterprise. http://www.infotech.com/research/non-terrestrial-wan-redundancy-assessment
	Disaster Recovery Planning Call Tree	When disaster strikes, don't be left scrambling. A clear list of who must be called for what reason lessens the thinking required in a stressful situation. Develop a call tree and keep it up-to-date. http://www.infotech.com/research/disaster-recovery-planning-call-tree
	Business Impact Analysis Tool	A Business Impact Analysis is central to any Disaster Recovery Planning initiative. Use this tool to help prioritize business resources to be protected and identify the downtime tolerance of different business functions. http://www.infotech.com/research/business-impact-analysis-tool
▶	Potential Impact of the Euro Crisis on IT Departments	Europeans are facing a major economic crisis triggered by poor government financial management in the Euro zone. But many managers outside Europe don't see this as impacting them, especially if their own business is doing well. http://www.infotech.com/research/it-potential-impact-of-the-euro-crisis-on-it-departments
	Backup Operating Procedures Template	Use this Backup Operating Procedures Template in conjunction with the Optimize Backup Operations with a Recovery Services Plan Storyboard to document operating procedures for your backup environment. http://www.infotech.com/research/it-backup-operating-procedures-template
	Recovery Operating Procedures Template	Use this Recovery Operating Procedures Template in conjunction with the Optimize Backup Operations with a Recovery Services Plan Storyboard to document operating procedures for data recovery from a backup. http://www.infotech.com/research/it-recovery-operating-procedures-template
	Backup and Recovery Service Level Agreement Template	Use this service level agreement template in concert with the Optimize Backup Operations with a Recovery Services Plan Storyboard to provide end users and stakeholders with a clear sense of organizational recovery capabilities and service offerings. http://www.infotech.com/research/backup-and-recovery-service-level-agreement-template

Vendor Landscape: Backup Software for Heterogeneous Environments		
	Vendor Landscape: Backup Software for Heterogeneous Environments	If the Cloud is part of your plans, be sure that your backup provider works with a vendor-provided or third-party platform that meets your needs. http://www.infotech.com/research/it-vendor-landscape-heterogeneous-backup-software
	Vendor Landscape Storyboard: Backup Software for Heterogeneous Environments	Your heterogeneous backup solution has to manage an increasingly complex system environment, which includes Windows, Linux, and UNIX-based systems, but also virtual and physical environments. http://www.infotech.com/research/it-vendor-landscape-storyboard-backup-software-for-heterogeneous-environments
	Heterogeneous Backup Software Vendor Shortlist Tool	This tool generates a shortlist of backup software providers for heterogeneous environments based on necessary capabilities and requirements. http://www.infotech.com/research/it-heterogeneous-backup-software-vendor-shortlist-tool
Vendor Landscape: Virtual Backup Software		
	Vendor Landscape: Virtual Backup Software	Organizations are becoming more and more invested in virtualization. This makes it important to select a solution that best meets recovery needs for VMs. As organizations provision an increasing number of VMs, it is getting more challenging to effectively backup everything. http://www.infotech.com/research/it-vendor-landscape-virtual-backup-software
	Vendor Landscape Storyboard: Virtual Backup Software	Backing up virtual infrastructure is becoming more complicated as server virtualization begins to handle increasing production workloads. Learn the strengths and challenges of traditional and virtual backup-only solutions in this space. http://www.infotech.com/research/it-vendor-landscape-storyboard-virtual-backup-software
	Virtual Backup Software Vendor Shortlist Tool	The Virtual Backup Software Vendor Shortlist Tool allows enterprises to profile their virtual backup requirements and generate a rank ordered vendor shortlist from a fixed list of vendors. http://www.infotech.com/research/it-virtual-backup-software-vendor-shortlist-tool
Vendor Landscape: Windows/Linux Backup for SMEs		
	Vendor Landscape: Windows/Linux Backup for SMEs	Backup software functionality is broadening to meet the needs of changing IT environments, including support for virtual servers and cloud backup. Recognizing that SMEs have fewer resources to dedicate to backup, ease of deployment and management is a focus. http://www.infotech.com/research/it-vendor-landscape-windowslinux-backup-for-smes
	Vendor Landscape Storyboard: Windows/Linux Backup for SMEs	Vendors included in this evaluation each offer a backup solution that supports Window/Linux environments and is capable of basic functionality, including compression, encryption, and bare metal restore. http://www.infotech.com/research/vendor-landscape-storyboard-windowslinux-backup-for-smes-
	Windows/Linux Backup Software Vendor Shortlist Tool	Info-Tech conducted its own market evaluation of eleven leading Windows/Linux Backup Software vendors. This tool allows enterprises to profile their backup requirements and generate a shortlist of vendors. http://www.infotech.com/research/it-windowslinux-backup-software-vendor-shortlist-tool

Additional Resources		
	Visio Alternatives	Make SOPs work for you with visual documents that are easier to create and more effective for process management and optimization. http://www.infotech.com/research/it-visio-alternatives
	IT Security 101	IT security is often overlooked and misunderstood by enterprises. Many feel that they have nothing worth stealing and any money spent on security is a wasted investment. Understand more about IT security and why it is important in every enterprise. http://www.infotech.com/research/it-security-101
	Virtual Medical Training Raises Real Concerns	A growing number of medical institutions and schools are using online virtual worlds as simulation environments for training and research. While these interactive programs offer significant educational benefits, IT should be prepared for a new set of security risks. http://www.infotech.com/research/virtual-medical-training-raises-real-concerns
	Health 2.0: A Double-Edged Scalpel	Recent healthcare headlines have been dominated by the so-called Health 2.0 revolution. Unlike other technology adoption decisions, this one is not up to IT; people are already using it. Understand the potential dangers and mitigate the risks before problems develop. http://www.infotech.com/research/health-20-a-double-edged-scalpel
	Professional Services: Sending Large Files Digitally Proves Feasible	Professional service firms often rely heavily on courier services to send documents. The sensitive nature and large size of these files justify the need for such a traditional approach. However, with other options now available, revisiting electronic file sharing can prove to be both strategically and financially feasible. http://www.infotech.com/research/professional-services-sending-large-files-digitally-proves-feasible
	Smart Chip Technology for Retailers: Is an Upgrade in the Cards?	American retailers should consider the long-term implications of international credit card industry changes to credit card security features when assessing current POS (Point Of Sale) hardware. However, retailers should avoid upgrading infrastructure now solely to accommodate Smart cards. http://www.infotech.com/research/smart-chip-technology-for-retailers-is-an-upgrade-in-the-cards
	Disaster Recovery in Healthcare Organizations: Part III	Establishing a comprehensive Disaster Recovery Plan (DRP) is very important in any industry, but particularly necessary in healthcare due to the regulatory scrutiny. Although the time, effort, and expense can be significant when developing a DRP, it is a worthwhile undertaking even if the disaster does not affect anyone outside the company. http://www.infotech.com/research/disaster-recovery-in-healthcare-organizations-part-iii
	The Sad State of Hotel Network Security	Network security is woefully inadequate in many hotels. Shore up wireless and wired networks before guests' data is compromised. http://www.infotech.com/research/the-sad-state-of-hotel-network-security
	Act Out the Worst Case with Scenario Planning	Scenario planning is a dress rehearsal for the unthinkable. Use it to identify single points of failure, ensure agility, mitigate risks, and increase stakeholder confidence. http://www.infotech.com/research/act-out-the-worst-case-with-scenario-planning

	Retailers Should Reinforce Their POS Security	Recent breaches in Point of Sale (POS) security demonstrate retailer vulnerability to credit card fraud. Ensure compliance with industry standards and tighten network security to protect client and enterprise data. http://www.infotech.com/research/retailers-should-reinforce-their-pos-security
	The Red Flags of Identity Theft for Financial Services	By passing section 114 of FACTA into legislation, the US government is taking a hard stand against the risk and cost of identity theft. Understand and avoid Red Flags or risk failed compliance and its potentially crippling costs. http://www.infotech.com/research/the-red-flags-of-identity-theft-for-financial-services
	Low-Cost Encryption for Law Firms	Lawyers' laptops and flash drives are prime targets for theft, and the consequences can be disastrous for the firm. A simple, inexpensive encryption tool will safeguard sensitive client data from thieves. http://www.infotech.com/research/low-cost-encryption-for-law-firms
	Banks Beware: XSS Is An Attack, Not a New RSS	Cross Site Scripting (XSS) is a threat that is being leveraged against all business with an online presence. Given that this attack is being used increasingly for phishing purposes, and that financial institutions are the leading target of such attacks, banks should take the problem very seriously. Protecting the enterprise from this problem is a security must. http://www.infotech.com/research/banks-beware-xss-is-an-attack-not-a-new-rss
	Campus Alert Systems Critical to Student Safety	Effective emergency alert and notification capabilities are essential for today's campus environments. To realize optimal coverage and capabilities as well as streamlined deployment and management, investigate solutions that offer multimodal capabilities and tight integration with the existing IT infrastructure. http://www.infotech.com/research/campus-alert-systems-critical-to-student-safety
	Banks Must Consider Security When Adopting Web 2.0	To stay competitive in the market place and achieve higher levels of employee productivity, banks are turning to Web 2.0 technologies. While these technologies can be differentiators, implementing them creates risks. Financial institutions need to be aware of the threats associated with these technologies and take action to ensure proper protection. http://www.infotech.com/research/banks-must-consider-security-when-adopting-web-20
	CommerceGuard Improves Shipping Container Security	Given the volume of shipping containers that enterprises use every day, GE's CommerceGuard system represents a significant security enhancement, eliminating tampering with the container, and therefore the goods it holds. Even a limited deployment that involves only the enterprise's facilities can still offer a greater level of cargo protection than the use of unprotected containers, all for a minimal cost. http://www.infotech.com/research/commerceguard-improves-shipping-container-security
	Local Governments: Get Prepared for IPv6	To avoid many of the difficulties currently being faced by their federal counterparts, state and local governments should start planning for IPv6 today. Begin the process by inventorying current IPv6 capabilities across the existing network infrastructure. http://www.infotech.com/research/local-governments-get-prepared-for-ipv6

Operations: Manage Budgets & Costs

Type	Document	Description
	Cost Optimization User Classification Tool	Classify your users to execute service-level tiering. http://www.infotech.com/research/it-cost-optimization-user-classification-tool

Operations: Service Desk

Tools	Document	Description
Vendor Landscape: Mid-Market Service Desk Software		
	Vendor Landscape: Mid-Market Service Desk Software	Service desk tools have moved beyond simple help desk ticketing systems to integrated solutions with full-service management and automation. Ensure that you select the best service desk solution for your enterprise needs. http://www.infotech.com/research/vendor-landscape-mid-market-service-desk-software
	Vendor Landscape Storyboard: Mid-Market Service Desk Software	Service desk tools have moved beyond simple help desk ticketing systems to integrated solutions with full-service management and automation. Ensure that you select the best service desk solution for your enterprise needs. http://www.infotech.com/research/vendor-landscape-storyboard-mid-market-service-desk
	Mid-Market Service Desk Vendor Shortlist & Detailed Feature Analysis Tool	This tool generates a shortlist of service desk software providers based on necessary capabilities and requirements. http://www.infotech.com/research/mid-market-service-desk-vendor-shortlist-detailed-feature-analysis-tool
	Service Desk RFP Template	A Request for Proposal (RFP) is a formal invitation issued by a business or agency requesting interested vendors to submit written proposals meeting a particular set of requirements. http://www.infotech.com/research/service-desk-rfp-template
	Service Desk Vendor Demo Script	Use this demonstration script to provide service desk solution vendors with a consistent set of instructions, ensuring an objective comparison of product features. http://www.infotech.com/research/service-desk-vendor-demo-script
Blueprint: Deploy Changes More Rapidly by Going Agile		
	Deploy Changes More Rapidly by Going Agile	IT is under pressure to deliver more value to the business. Understand how applying Agile principles to Infrastructure change allows you to deploy new and enhanced functionality quickly and safely. http://www.infotech.com/research/it-deploy-changes-more-rapidly-by-going-agile
	Storyboard: Deploy Changes More Rapidly by Going Agile	IT is under pressure to deliver more value to the business. Understand how applying Agile principles to Infrastructure change allows you to deploy new and enhanced functionality quickly and safely. http://www.infotech.com/research/it-storyboard-deploy-changes-more-rapidly-by-going-agile
	Agile Project Prioritization Tool	Use this tool to prioritize your next steps in becoming more agile. http://www.infotech.com/research/it-agile-project-prioritization-tool
	Agile Process Assessment Tool	Use this tool to determine how agile you are with respect to process management, testing, and automation. http://www.infotech.com/research/it-agile-process-assessment-tool

Tools	Document	Description
	Agile People Assessment Tool	Use this tool to determine how Agile you are with respect to company culture, team collaboration, and customer engagement. http://www.infotech.com/research/it-agile-people-assessment-tool
	Agile Fit Assessment Tool	Determine the issues at your organization that are holding you back that could benefit from an agile approach. http://www.infotech.com/research/it-agile-fit-assessment-tool
Blueprint: Develop an IT Service Desk Strategy		
	Develop an IT Service Desk Strategy	IT Service Desk processes are impacted by emerging trends such as Cloud, Social Collaboration, BYOD, Consumerization, and self-serve BI. As well, end users are more techno-savvy and driven to self-solve than ever before. This solution set gives IT leaders a perspective on re-developing their Service Desk strategy in response to the growing recognition of ITIL and the shifting landscape of IT support. http://www.infotech.com/research/it-develop-an-it-service-desk-strategy
	Storyboard: Develop an IT Service Desk Strategy	IT Service Desk processes are impacted by emerging trends such as Cloud, Social Collaboration, BYOD, Consumerization, and self-serve BI. As well, end users are more techno-savvy and driven to self-solve than ever before. This solution set gives IT leaders a perspective on re-developing their Service Desk strategy in response to the growing recognition of ITIL and the shifting landscape of IT support. http://www.infotech.com/research/storyboard-develop-an-it-service-desk-strategy
	Service Desk TCO Comparison	A hosted (Software-as-a-Service) service desk tool may be more cost-effective than an on-premise package. Use this Total Cost of Ownership (TCO) calculator to determine which of the two options is best for your organization. http://www.infotech.com/research/it-service-desk-tco-comparison
	Service Desk Gap Tracker	Service gaps arise from situations where technology solutions are not delivered and tracked at the lowest cost to the organization as a whole. The gaps should be identified and tracked in order to properly optimize future Service Desk investments. http://www.infotech.com/research/it-service-desk-gap-tracker
	Complete Guide to Service Desk software RFPs	Service desk software RFP responses can be daunting to evaluate and score. If an RFP is required, use the Info-Tech service desk software evaluation and RFP response scoring tool to automate the process. http://www.infotech.com/research/complete-guide-to-service-desk-software-rfps
	Service Desk Selection Demo Script Template	Putting a service desk vendor through a scripted demo can be challenging but a standardized script and scoring methodology is very useful in ensuring a fair comparison. This service desk demonstration and scoring tool ensures it is an even evaluation. http://www.infotech.com/research/service-desk-selection-demo-script-template
Blueprint: Manage Help Desk Staffing		
	Manage Help Desk Staffing	Staffing the help desk with the right people is critical, whether hiring or trimming. http://www.infotech.com/research/manage-help-desk-staffing

Tools	Document	Description
	Help Desk Staffing Calculator	Determining the appropriate end user to help desk staff ratio can be difficult. Help Desk environments with steady request volumes and staff numbers should use this tool to determine the accurate number of staff required to address help desk requests. http://www.infotech.com/research/help-desk-staffing-calculator
Blueprint: Ensure Service Delivery with Systems Management		
	Ensure Service Delivery with Systems Management	This solution set will help you assess your current systems management environment, business needs, and create a plan to move to service-centric systems management. http://www.infotech.com/research/ensure-service-delivery-with-systems-management
	Storyboard: Ensure Service Delivery with Systems Management	Systems management improves service availability and performance by up to 50%. Documentation of services, systems and processes plays a major role in driving improvements, while focusing on service delivery to the business minimizes the effort required to realize gains. IT leaders need to ensure the systems management discipline is entrenched to succeed. http://www.infotech.com/research/storyboard-ensure-service-delivery-with-systems-management
	Systems Management Strategy Assessment Tool	Systems management can improve availability and performance by up to 50%. IT organizations need to implement optimal systems management with a minimum of effort. Info-Tech's strategy selection tool will assess what level of process, documentation and tools will help you most. http://www.infotech.com/research/systems-management-strategy-assessment-tool
Blueprint: Implement Systems Management to Improve Availability and Visibility		
	Implement Systems Management to Improve Availability and Visibility	This blueprint will help you implement a systems management solution to improve availability and visibility. http://www.infotech.com/research/implement-systems-management-to-improve-availability-and-visibility
	Storyboard: Implement Systems Management to Improve Availability and Visibility	This blueprint will help you implement a systems management solution to improve availability and visibility. http://www.infotech.com/research/storyboard-implement-systems-management-to-improve-availability-and-visibility
	Systems Management Service Level Assessment	Use this tool to evaluate the present state of your infrastructure to facilitate your systems management optimization efforts. Identify current performance levels, key dependencies, and prioritize systems and services. http://www.infotech.com/research/systems-management-service-level-assessment
	Systems Management Discipline Capability Assessment	Evaluate capabilities across several systems management disciplines to identify areas in need of improvement. http://www.infotech.com/research/systems-management-discipline-capability-assessment
	Systems Management Skills Inventory and Gap Analysis	Use this tool to document available skills and create a training plan to facilitate your systems management initiative. http://www.infotech.com/research/systems-management-skills-inventory-and-gap-analysis
	Systems Management Feature Evaluation Tool	Use the Systems Management Feature Evaluation Tool to generate a shortlist of solutions based on your specific needs http://www.infotech.com/research/systems-management-feature-evaluation-tool

Tools	Document	Description
	Systems Management Project Scorecard	Use the Systems Management Project Scorecard to identify possible problems inhibiting success of the systems management implementation. http://www.infotech.com/research/systems-management-project-scorecard
	Systems Management Project Charter Template	Communicate your systems management implementation initiative to stakeholders with a project charter. http://www.infotech.com/research/systems-management-project-charter-template
	Systems Management RFP Template	Use this template to help create a request for proposal (RFP) for a systems management solution according to your enterprise requirements. http://www.infotech.com/research/systems-management-rfp-template
	Systems Management SOP Template	Well-developed processes are a critical component of systems management success. This template will help organizations ensure that their processes are effectively communicated to IT teams to ensure compliance with internal and external standards. http://www.infotech.com/research/systems-management-sop-template
Blueprint: Outsource or Repatriate the Service Desk		
	Outsource or Repatriate the Service Desk	Whether managing, outsourcing, or repatriating the Service Desk, there are core issues that must be clarified and consistently maintained (e.g. reporting/analytics, formalized skill set and escalation guidelines, ticket classification rules, etc.). http://www.infotech.com/research/it-outsource-or-repatriate-the-service-desk
	Storyboard: Outsource or Repatriate the Service Desk	Often, the service desk is dismissed as a tactical function that merely needs cost optimization. Done poorly, outsourcing can drive inefficiencies that outweigh any cost savings. To avoid repatriation, negotiate the outsourcing deal and manage the vendor as if you intend to repatriate from the beginning. http://www.infotech.com/research/it-storyboard-outsource-or-repatriate-the-service-desk
Vendor Landscape: Enterprise Service Desk Software		
	Vendor Landscape: Enterprise Service Desk Software	Enterprise Service Desk software focuses on powerful built-in features for automation and reporting, along with the ability to integrate with dedicated IT tools, such as full-blown asset management. Use this vendor evaluation to select the right vendor for your organizational needs. http://www.infotech.com/research/it-vendor-landscape-enterprise-service-desk-software
	Vendor Landscape Storyboard: Enterprise Service Desk Software	Info-Tech evaluated nine competitors in the enterprise Service Desk market. http://www.infotech.com/research/it-vendor-landscape-storyboard-enterprise-service-desk-software
	Enterprise Service Desk Vendor Shortlist Tool	This tool allows large enterprises to generate a customized shortlist of Enterprise Service Desk vendors based on required capabilities and future requirements for product features, architecture, and usability. http://www.infotech.com/research/it-enterprise-service-desk-vendor-shortlist-tool
	Service Desk Case Study of Olmsted Medical Center	Over the years, 16 groups had emerged within Olmsted Medical Center that provided IT service desk support to employees, visitors, and patients. Info-Tech Research Group delivered a five-day Service Desk Optimization workshop to design an optimum structure for the target state service desk, consolidating the 16 disparate entities into a single organization. http://www.infotech.com/research/service-desk-case-study-of-olmsted-medical-center

Tools	Document	Description
	Service Desk SOP for an Energy Company	With a new service desk tool coming in the following week, the organization wanted to formalize their service desk processes to ensure all requirements were met, and create a formal document to move forward with. http://www.infotech.com/research/it-service-desk-sop-for-an-energy-company
	Service Desk SOP for a Public Sector Organization	Increasing staff and an organizational need to improve the maturity of the service desk meant IT had to rebuild its service desk to ensure all requests were handled efficiently and effectively. http://www.infotech.com/research/service-desk-sop-for-a-public-sector-organization
	Patch Management Policy	All companies require a well written patch management policy to ensure that IT systems function optimally and that vulnerabilities are mitigated. Use this template to create your own customized policy. http://www.infotech.com/research/patch-management-policy
	Finding Your Help Desk Ratio	Use this downloadable tool to help you pinpoint the perfect number of help desk staffers for your organization's needs. http://www.infotech.com/research/finding-your-help-desk-ratio
	Five Reality Checks: Before You Outsource Your Help Desk	Constraints on budgets, hiring, and facilities are driving more and more businesses to consider outsourcing their Help Desks. While outsourcing is hardly a new idea, many IT leaders are still starting the process without the proper reality check up-front. Make sure your organization is truly a candidate before starting a project to outsource the Help Desk. http://www.infotech.com/research/it-five-reality-checks-before-you-outsource-your-help-desk
Blueprint: Optimize Systems Management to Improve IT Resilience and Proactivity		
	Optimize Systems Management to Improve IT Resilience and Proactivity	Systems management is about more than checking if the lights are on. Optimize on three levels – "people, processes, and technology" - to enhance IT resilience and proactivity. http://www.infotech.com/research/optimize-systems-management-to-improve-it-resilience-and-proactivity
	Storyboard: Optimize Systems Management to Improve IT Resilience and Proactivity	Effective systems management can be a critical driver toward IT maturity. However, many organizations continue to collect data without any idea of what to do with it. They have too many tools and no clear strategy around how to use them. http://www.infotech.com/research/storyboard-optimize-systems-management-to-improve-it-resilience-and-proactivity
	Systems Management Service Level Assessment	Use this tool to evaluate the present state of your infrastructure to facilitate your systems management optimization efforts. Identify current performance levels, key dependencies, and prioritize systems and services. http://www.infotech.com/research/systems-management-service-level-assessment
	Systems Management Discipline Capability Assessment	Evaluate capabilities across several systems management disciplines to identify areas in need of improvement. http://www.infotech.com/research/systems-management-discipline-capability-assessment
	Systems Management Skills Inventory and Gap Analysis	Use this tool to document available skills and create a training plan to facilitate your systems management initiative. http://www.infotech.com/research/systems-management-skills-inventory-and-gap-analysis

Tools	Document	Description
	Systems Management Feature Evaluation Tool	Use the Systems Management Feature Evaluation Tool to generate a shortlist of solutions based on your specific needs http://www.infotech.com/research/systems-management-feature-evaluation-tool
	Systems Management Documentation Scorecard	Evaluate your current systems management documentation and identify what needs to be updated and when. http://www.infotech.com/research/systems-management-documentation-scorecard
	Systems Management Tool Rationalization Matrix	Create a management tool inventory and identify redundant capabilities to effectively streamline your software toolkit. http://www.infotech.com/research/systems-management-tool-rationalization-matrix
	Systems Management Project Charter Template	Communicate your systems management implementation initiative to stakeholders with a project charter. http://www.infotech.com/research/systems-management-project-charter-template
	Systems Management SOP Template	Well-developed processes are a critical component of systems management success. This template will help organizations ensure that their processes are effectively communicated to IT teams to ensure compliance with internal and external standards. http://www.infotech.com/research/systems-management-sop-template
Blueprint: Save 30% on Support Costs by Streamlining Desktop Management		
	Save 30% on Support Costs by Streamlining Desktop Management	Desktop management is a significant time sink for many IT organizations. Pivoting to a proactive approach, characterized by careful planning, process optimization, and image standardization, can help IT organizations save significantly on desktop management costs. http://www.infotech.com/research/save-30-on-support-costs-by-streamlining-desktop-management
	Storyboard: Save 30% on Support Costs by Streamlining Desktop Management	Desktop management is a significant time sink for many IT organizations. Pivoting to a proactive approach, characterized by careful planning, process optimization, and image standardization, can help IT organizations save significantly on desktop management costs. http://www.infotech.com/research/storyboard-save-30-on-support-costs-by-streamlining-desktop-management
	Desktop Management Optimization Challenge Analysis Tool	Use this tool to identify challenges faced by desktop management administrators. http://www.infotech.com/research/desktop-management-optimization-challenge-analysis-tool
	Desktop Management Optimization Roadmap Building Tool	Use this tool to establish a high-level roadmap for your desktop management initiatives. http://www.infotech.com/research/desktop-management-optimization-roadmap-building-tool
	Desktop Management Optimization ROI Calculator	This tool can estimate potential savings and ROI for various desktop management optimization initiatives. http://www.infotech.com/research/desktop-management-optimization-roi-calculator
	Application Packager	The application packager is responsible for developing, building, and supporting software application packaging for different deployments. http://www.infotech.com/research/application-packager

Tools	Document	Description
	Desktop Management Optimization Business Case Template	The desktop management optimization business case template will help present the value of desktop optimization to core stakeholders. http://www.infotech.com/research/desktop-management-optimization-business-case-template
	Desktop Management Optimization SOP Template	Use this template to document policies, procedures, and best practices for desktop administration. http://www.infotech.com/research/desktop-management-optimization-sop-template
Blueprint: Take the High Road to Service Desk Effectiveness		
	Take the High Road to Service Desk Effectiveness	This solution set will pinpoint the critical aspects for driving the highest level of effectiveness from your Service Desk while increasing long-term value. http://www.infotech.com/research/it-take-the-high-road-to-service-desk-effectiveness
	Storyboard: Take the High Road to Service Desk Effectiveness	This solution set will pinpoint the critical aspects for driving the highest level of effectiveness from your Service Desk while increasing long-term value. http://www.infotech.com/research/it-storyboard-take-the-high-road-to-service-desk-effectiveness
Blueprint: Understand the Value of Service Desk Optimization		
	Understand the Value of Service Desk Optimization	If done right, service desk optimization will allow your service desk to improve the key performance indicators (KPIs), reduce cost per incident, and increase service desk capacity. http://www.infotech.com/research/it-understand-the-value-of-service-desk-optimization
	Storyboard: Understand the Value of Service Desk Optimization	Forecast the value of service desk optimization. http://www.infotech.com/research/it-storyboard-understand-the-value-of-service-desk-optimization
	Service Desk Maturity Assessment	Conduct a service desk maturity assessment and reinforce your weak dimensions. http://www.infotech.com/research/it-service-desk-maturity-assessment
	Service Desk Optimization Business Case Template	Make the case for service desk optimization. http://www.infotech.com/research/it-service-desk-business-plan-template
Additional Resources		
	Choose between Agent or Agentless Patch Management Software	Automated patch management is becoming more of a necessity in today's environment. Learn about the different types of patch management software to be able to choose the best solution for your company. http://www.infotech.com/research/choose-between-agent-or-agentless-patch-management-software
	The Benefits of Patch Management Software	Managing the patch installation processes of any company is a daunting task, especially when done without patch management software. Patch management software is meant to speed up the installation process by automating the management, testing, and installation of patches. This note describes the uses of patch management software, its benefits and challenges. http://www.infotech.com/research/the-benefits-of-patch-management-software

Operations: Service Management

Type	Document	Description
Blueprint: Create a Configuration Management Roadmap		
	Create a Configuration Management Roadmap	You do not need a CMDB to record and monitor every asset in your environment in order to reap the benefits of Configuration Management. Both the design and implementation of the system can be right-sized, if you invest in creating a roadmap first. http://www.infotech.com/research/create-a-configuration-management-roadmap
	Storyboard: Create a Configuration Management Roadmap	A CMDB is only as valuable as the processes it supports. Before you invest, identify the IT processes that will be improved through use of a CMDB. With a good roadmap, you can set yourself up for CMDB success. This research will show you how. http://www.infotech.com/research/storyboard-create-a-configuration-management-roadmap
	Configuration Management Project Roadmap Tool	The task management tool can be used to define tasks, assign task owners, set deadlines, and monitor the progress of your Configuration Management Roadmap. http://www.infotech.com/research/configuration-management-project-roadmap-tool
	Configuration Management Roadmap Project Charter Template	A project charter will help you set expectations by documenting project stakeholders and establishing clear project objectives and scope for the project. http://www.infotech.com/research/configuration-management-roadmap-project-charter-template
	Configuration Management Roadmap Stakeholder Presentation	This presentation template will help you effectively describe your Configuration Management roadmap to stakeholders. http://www.infotech.com/research/configuration-management-roadmap-stakeholder-presentation
	Configuration Management Roadmap Template	This template will guide you through the creation of Configuration Management Roadmap. Use the resulting roadmap to make the case for a CMDB. http://www.infotech.com/research/configuration-management-roadmap-template
Blueprint: Establish a Right-Sized Release and Deployment Management Process		
	Establish a Right-Sized Release and Deployment Management Process	This project will help you establish a right-sized release and deployment management process to enable faster, better quality, and lower cost releases. http://www.infotech.com/research/establish-a-right-sized-release-and-deployment-management-process
	Storyboard: Establish a Right-Sized Release and Deployment Management Process	While ITIL provides a good process framework, it is difficult to apply. A good release and deployment management process will be right-sized to organizational need, and applicable to both small (one or several changes) and major releases (significant upgrades or new software). http://www.infotech.com/research/storyboard-establish-a-right-sized-release-and-deployment-management-process

Type	Document	Description
	Release and Deployment Management Gap Analysis Tool	This tool will generate a gap analysis, and provide recommendations to help you achieve your target state. Use these results to target your investment in release and deployment management, avoiding unnecessary over or under investment. http://www.infotech.com/research/release-and-deployment-management-gap-analysis-tool
	Release and Deployment Management Maturity Assessment Tool	This tool should be used to measure your adherence to the release and deployment management process. The results will allow you to focus improvement efforts on process areas with the lowest adherence and maturity. http://www.infotech.com/research/release-and-deployment-management-maturity-assessment-tool
	Release and Deployment Management Metrics Tool	This tool should be used to monitor key performance indicators and report the success of your release and deployment management process to stakeholders. http://www.infotech.com/research/release-and-deployment-management-metrics-tool
	Release and Deployment Management SOP Template	The release and deployment standard operating procedure (SOP) should be used to establish and document a formal release and deployment management process at your organization. http://www.infotech.com/research/release-and-deployment-management-sop-template
Blueprint: Establish a Rigorous Problem Management Process		
	Establish a Rigorous Problem Management Process	This project will guide you to implement a problem management process that will decrease recurring incidents and enhance incident prevention. http://www.infotech.com/research/establish-a-rigorous-problem-management-process
	Storyboard: Establish a Rigorous Problem Management Process	Improve service quality by decreasing the frequency and impact of incidents. Implement a rigorous Problem Management (PM) process that will eliminate recurring issues and also prevent new incidents from occurring. http://www.infotech.com/research/storyboard-establish-a-rigorous-problem-management-process
	Current Maturity and Gap Analysis Assessment Tool	This tool can provide a review of the current problem management process maturity of an organization and generates a gap analysis comparing the current maturity results against the envisioned goal state for the organization's process. http://www.infotech.com/research/current-maturity-and-gap-analysis-assessment-tool
	Problem Management Stakeholder Buy-in Template	A lack of executive buy-in is the number one reason projects fail. This document relates problem management to the common pain points and the desired service outcomes felt by an organization and assists project leads in gaining critical management support for a process design. http://www.infotech.com/research/problem-management-stakeholder-buy-in-template
	Problem Management SOP	The Problem Management Standard Operating Procedure should be used to establish and document a formal problem management process at your organization. http://www.infotech.com/research/problem-management-sop

Type	Document	Description
	Problem Management Causal RCA Template	Successful problem resolutions can only occur through clear root cause analysis and identification. Creating a standardized procedure for reviewing and investigating critical and recurring incidents will improve problem resolutions and the functionality of the service portfolio. http://www.infotech.com/research/problem-management-causal-rca-template
	Problem Management Diagnostic RCA Template	Successful problem resolutions can only occur through clear root cause analysis and identification. Creating a standard procedure for reviewing and investigating critical and recurring incidents will improve problem resolutions and the functionality of the service portfolio. http://www.infotech.com/research/problem-management-diagnostic-rca-template
	Problem Management Proactive RCA Template	Identifying service problems prior to their actual occurrence and providing preventive fixes allows a service portfolio to mature further and improve its performance by managing on a proactive and strategic level. http://www.infotech.com/research/problem-management-proactive-rca-template
Blueprint: Fast-Track a Service Management Roadmap		
	Fast-Track a Service Management Roadmap	Implementing Service Management can be a tricky business, and if planning is not given its due diligence, can lead to a number of organizational pains. Info-Tech will help you create a roadmap to guide you to success. http://www.infotech.com/research/fast-track-a-service-management-roadmap
	Storyboard: Fast-Track a Service Management Roadmap	Implementing Service Management can be a tricky business, and if planning is not given its due diligence, can lead to a number of organizational pains. Info-Tech will help create a roadmap to guide you to success. http://www.infotech.com/research/storyboard-fast-track-a-service-management-roadmap
	Service Management Roadmap Tool	Info-Tech's Service Management Roadmap Tool will facilitate the creation of a tangible visual roadmap which you can leverage to help you obtain approval to undergo more detailed planning from your senior management stakeholders. http://www.infotech.com/research/service-management-roadmap-tool
	Service Management Roadmap Project Charter	Info-Tech Research Group's Service Management Project Charter Template is designed to help obtain support from management to spend time completing the roadmap and preliminary planning. http://www.infotech.com/research/service-management-roadmap-project-charter
	Service Management Stakeholder Presentation	Obtaining stakeholder support can be a major blocker to service management implementation. This Service Management Stakeholder presentation will help you effectively communicate your efforts to your stakeholders and obtain approval for future planning. http://www.infotech.com/research/service-management-stakeholder-presentation
Blueprint: Identify Service Metrics that Matter		
	Identify Service Metrics that Matter	In order to demonstrate the value of IT, CIOs need to identify key metrics and implement a process for analyzing and using this information without going into data overload! http://www.infotech.com/research/identify-service-metrics-that-matter

Blueprint: Change and Release Management		
	Change and Release Management	The Change and Release Management workshop is designed to help you establish and implement a rigorous Change and Release Management process at your organization. http://www.infotech.com/research/change-and-release-management
Blueprint: Outsource Systems Management to Improve Capabilities and Reduce Costs		
	Outsource Systems Management to Improve Capabilities and Reduce Costs	Outsourcing can extend your systems management capabilities and save money in the process, but many organizations report dissatisfaction with their outsourcing arrangement. Focus on building a collaborative, communicative relationship to avoid buyer's remorse. http://www.infotech.com/research/outsource-systems-management-to-improve-capabilities-and-reduce-costs
	Storyboard: Outsource Systems Management to Improve Capabilities and Reduce Costs	Outsourcing can extend your systems management capabilities and save money in the process, but many organizations report dissatisfaction with their outsourcing arrangement. Focus on building a collaborative, communicative relationship to avoid buyer's remorse. http://www.infotech.com/research/storyboard-outsource-systems-management-to-improve-capabilities-and-reduce-costs
	ITSM Case Study of a Financial Services Technology Provider	A financial technology solutions provider has been experiencing tremendous growth, spurring the number of departments, systems, and services to support it. http://www.infotech.com/research/itsm-case-study-of-a-financial-services-technology-provider
	Service Management Current State Survey	Team engagement is crucial for a service management implementation plan. Leverage the Service Management Current State Survey to solicit the opinion of your roadmap team and obtain a more holistic perspective. http://www.infotech.com/research/service-management-current-state-survey
	Service Management Target State Survey	Team engagement is crucial for a service management implementation plan. Leverage the Service Management Target State Survey to solicit the opinion of your roadmap team and obtain a more holistic perspective. http://www.infotech.com/research/service-management-target-state-survey
	Service Management Goals & Objectives Survey	Team engagement is crucial for a service management implementation plan. Leverage the Service Management Goals & Objectives Survey to solicit the opinion of your roadmap team and obtain a more holistic perspective. http://www.infotech.com/research/service-management-goals-objectives-survey
	Outsourcing Systems Management Decision Workbook	Use this tool to assess current capabilities and criticality of insourced services in order to make a decision around outsourcing systems management. The workbook proceeds from an initial project scorecard through a decision-making tool and RFP scoring. http://www.infotech.com/research/outsourcing-systems-management-decision-workbook
	Outsource Systems Management â€" Project Charter Template	An effective project charter can help bring key stakeholders on board by clearly communicating the scope and benefits of your project. Use this template to organize your project and make sure it gets started off on the right foot. http://www.infotech.com/research/outsource-systems-management-project-charter-template
	Managed Service Provider RFP Template	Use this template alongside the Outsource Systems Management Project blueprint deck to draft an effective RFP that will ensure you have complete coverage of your organization's needs. http://www.infotech.com/research/managed-service-provider-rfp-template

	Outsource Systems Management â€“ Vendor Engagement Template	Use this template to plan your vendor engagement strategy and ensure a continuous, collaborative, and mutually beneficial relationship with your vendor. http://www.infotech.com/research/outsource-systems-management-vendor-engagement-template
Blueprint: Optimize the Change Management Process		
	Optimize the Change Management Process	Establish a formal Change Management process that allows you balance the needs of the stakeholders requesting the change with the risk it poses to the infrastructure. This will make it possible to both respond to business needs quicker and reduce change-related incidents and disruptions. http://www.infotech.com/research/optimize-the-change-management-process
	Storyboard: Optimize the Change Management Process	This project will allow you to optimize your Change Management process in order to respond to business needs faster and reduce change related incidents. http://www.infotech.com/research/storyboard-optimize-the-change-management-process
	Change Management Assessment Tool	The Change Management Assessment tool will help you identify the gaps in your Change Management process, prioritize process improvement efforts, and measure process success. http://www.infotech.com/research/change-management-assessment-tool
	Change Advisory Board Charter	The Info-Tech Change Advisory Board Charter is a template that should be used to document the mission, authority, and activities of the Change Advisory Board (CAB) and Emergency CAB (eCAB). http://www.infotech.com/research/change-advisory-board-charter
	Change Management: Request for Change Form	The Info-Tech Request for Change Form is a template that should be used to standardize the documentation of the change request process. http://www.infotech.com/research/change-management-request-for-change-form
	Change Management Standard Operating Procedure	The Change Management Standard Operating Procedure should be used to establish and document a formal Change Management process at your organization. http://www.infotech.com/research/change-management-standard-operating-procedure
	Change Management Maturity Assessment Tool	This tool should be used to assess your current change management process and identify areas of the process that are in need of improvement. http://www.infotech.com/research/change-management-maturity-assessment-tool
	Change Management Metrics Tool	This tool should be used to monitor key performance indicators and report the success of your change management process to stakeholders. http://www.infotech.com/research/change-management-metrics-tool
	Change Management Project Charter	Info-Tech Research Group's Change Management Project Charter template is designed to help the member obtain senior management support for the project, as well as organize your team, mission, performance metrics, and stakeholders. http://www.infotech.com/research/change-management-project-charter

Risk Management Research

Risk Management: Disaster Recovery Planning

Type	Document	Description
★	IT Continuity Planning: Business Impact and Risk Assessment	When a Business Impact and Risk Assessment is completed, you will have a complete list of the risks specific to each IT asset, as well as risk reports and profiles for the business impact analysis. Consider revisiting your Business Impact and Risk Assessment annually. http://www.infotech.com/research/it-continuity-planning-business-impact-and-risk-assessment
🔍	DRP Case Study of a Global Chemical Manufacturing Firm	The Americas IT department of a global chemical manufacturing firm had made significant strides in building redundancy and resiliency within the environment. However, little had been done to define, assess, and prioritize recovery objectives or document recovery plans. The IT team risked not being able to meet IT recovery targets in a serious disaster. They sought to develop a process for evaluating and prioritizing systems, and design a recovery process that met business and financial needs. http://www.infotech.com/research/drp-case-study-of-a-global-chemical-manufacturing-firm
🔍	DRP Case Study of a Large Tourism Complex	A large American tourism complex had some system backup capabilities, but no disaster recovery plan (DRP). The data center was housed in a 90-year-old wooden building with a tar and gravel roof prone to leaks. Failure to develop disaster prevention and recovery plans will leave the organization in a precarious position should any incident affect the data center. http://www.infotech.com/research/drp-case-study-of-a-large-tourism-complex
🔍	DRP Case Study of a Mid-Sized Credit Union	A highly-virtualized credit union located in the eastern US has made great strides in building redundancy in the main data center. However, apart from two major applications, the company was unprepared for a major disaster - lending and user connectivity systems would be down for 5-7 days, with full functionality hampered for weeks. An assessment of risk and downtime costs needed to be completed to ensure that appropriate plan and process in place to address the risk of unplanned downtime. http://www.infotech.com/research/drp-case-study-of-a-mid-sized-credit-union
Additional Resources		
🗎	Disaster Recovery in Healthcare Organizations: Part I	Establishing a comprehensive Disaster Recovery Plan (DRP) is very important in any industry, but particularly necessary in healthcare due to the degree of regulatory scrutiny. Securing the safety and flow of information in all its various forms should be the foundation of any DRP. Make certain that all elements of a distributed information technology environment are accounted for within the overall plan. http://www.infotech.com/research/disaster-recovery-in-healthcare-organizations-part-i

Risk Management: Security Policy & Process

Type	Document	Description
	Security Awareness Training Policy Template	Building a Security Policy is shown to reduce the occurrence of breaches by up to 93%; however, development costs an average of $50,000 and takes six months. Info-Tech's customizable Security Training Policy Template can be used as a component of a complete Policy that allows enterprises to avoid those costs. http://www.infotech.com/research/security-awareness-training-policy-template
	Personnel Security Policy Template	Following defined staffing protocols ensures that information system users understand and treat their access with appropriate care. Without these protocols the potential exists that users will have insufficient regard for the security of the information systems or information they use, increasing the risk the company is required to accept. http://www.infotech.com/research/personnel-security-policy-template

Security & Risk Management Research

Security & Risk Management: Risk Management

Type	Document	Description
Blueprint: Develop and Implement a Security Risk Management Program		
	Develop and Implement a Security Risk Management Program	A formal security risk management program creates better resource and budget allocation, and involves broader business players to ensure everyone feels a responsibility towards the success of the program. http://www.infotech.com/research/develop-and-implement-a-security-risk-management-program
	Storyboard: Develop and Implement a Security Risk Management Program	A formal security risk management program creates better resource and budget allocation and involves broader business players to ensure everyone feels a responsibility towards the success of the program. http://www.infotech.com/research/storyboard-develop-and-implement-a-security-risk-management-program
	Security Risk Management Communication Plan	This two-part communication plan provides a starting point to communicate your security risk management program (Part 1) and its results (Part 2). http://www.infotech.com/research/security-risk-management-communication-plan
	Security Risk Management Methodology	Formal documentation is helpful when it comes to audits and keeping track of revisions to your security risk management program. http://www.infotech.com/research/security-risk-management-methodology
	Security Risk Management Workbook	Info-Tech's comprehensive workbook allows you to document and classify your assets to identify your risks, as well as prioritize and plan to mitigate them. http://www.infotech.com/research/security-risk-management-workbook
Blueprint: Optimize Backup Operations with a Recovery Services Plan		
	Storyboard: Optimize Backup with a Recovery Services Plan	Refine processes, procedures, and operations to make sure your backup solution is capable of recovering what you need when you need it. http://www.infotech.com/research/it-storyboard-optimize-backup-with-a-recovery-services-plan

Security & Risk Management: Security Management

Type	Document	Description
▶	Security Plans Boost Security & Cut Costs	Enterprises making use of a formal Security Plan report higher levels of security and more cost-effective acquisitions of security solutions. Given that a Security Plan defines the enterprise's security architecture and deployment roadmap, this linkage is clear to see. This video will help you understand what a Security Plan is, how it is constructed, and the concerns that need to be addressed during plan development. http://www.infotech.com/research/security-plans-boost-security-cut-costs
Blueprint: Exploit Disruptive Security Trends for 2015		
	Exploit Disruptive Security Trends for 2015	This blueprint will allow you to proactively evaluate the security impact of major disruptive technology trends, threat landscape developments, and security market trends which can provide a highly security intelligent, managed risk approach to security spend. http://www.infotech.com/research/exploit-disruptive-security-trends-for-2015
	Storyboard: Exploit Disruptive Security Trends for 2015	Every year, new technology trends, security threats, and mitigation tactics emerge that can create a wide array of issues. Prepare for the future by using Info-Tech's research and methodology. http://www.infotech.com/research/storyboard-exploit-disruptive-security-trends-for-2015
	Business Disruptive Security Trends Survey	Use this survey to gain input from your business stakeholders to determine the relevance of the disruptive security trends to your organization. http://www.infotech.com/research/business-disruptive-security-trends-survey
	Disruptive Security Trends 2015 Business Informational Deck	Use this informational deck to communicate the disruptive technology trends that will be prevalent to your business stakeholders in 2015. http://www.infotech.com/research/disruptive-security-trends-2015-business-informational-deck
	Disruptive Security Trends 2015 IT Informational Deck	Use this informational deck to communicate the disruptive technology trends that will be prevalent to your IT and IT security staff in 2015. http://www.infotech.com/research/disruptive-security-trends-2015-it-informational-deck
	Disruptive Security Trends 2015 Relevance Tool	Use this tool to determine the relevance of the 2015 disruptive security trends to your organization, based on stakeholder input and your organization's risk profile. http://www.infotech.com/research/disruptive-security-trends-2015-relevance-tool
	Disruptive Security Trends 2015 Requirements Tool	Use this tool to determine the steps you must take to defend and secure your organization from the disruptive security trends of 2015. http://www.infotech.com/research/disruptive-security-trends-2015-requirements-tool
	Disruptive Security Trends 2015 Results Deck	Use this results template to communicate the security actions that you plan to implement to prepare for the disruptive security trends of 2015. http://www.infotech.com/research/disruptive-security-trends-2015-results-deck
	IT Disruptive Security Trends Survey	Use this survey to gain input from your IT staff to determine the relevance of the disruptive security trends to your organization. http://www.infotech.com/research/it-disruptive-security-trends-survey

Blueprint: Secure IaaS and PaaS Environments		
	Secure IaaS and PaaS Environments	This blueprint will comprehensively evaluate your hosted cloud risk profile to determine what unique security controls your organization requires to secure its cloud environment. SLA, contract negotiations, vendor management, and ongoing governance will ensure quick and maintained security. http://www.infotech.com/research/secure-iaas-and-paas-environments
	Storyboard: Secure IaaS and PaaS Environments	Securing your hosted cloud environments introduces new levels of complexity and finesse. Securing an IaaS or PaaS environment is a balancing act of determining whether the vendor or the consumer is responsible for meeting specific security requirements. http://www.infotech.com/research/storyboard-secure-iaas-and-paas-environments
	Cloud Security Roadmap Tool	Use this tool to develop your action-orientated roadmap on what must be done to securely adopt and migrate to your new IaaS or PaaS cloud environments. http://www.infotech.com/research/cloud-security-roadmap-tool
	IaaS and PaaS Cloud Security CAGI Tool	This tool is a unique security framework designed by Info-Tech that recommends various security requirements that must be met in order to ensure your IaaS/PaaS cloud environment. http://www.infotech.com/research/iaas-and-paas-cloud-security-cagi-tool
	IaaS and PaaS Security Communication Deck	Communicating security, especially cloud security, can be a difficult obstacle. This communication deck will provide you with the necessary medium to convey your findings. http://www.infotech.com/research/iaas-and-paas-security-communication-deck
	IaaS and PaaS Security Governance Program Template	The IaaS and PaaS Security Governance Program will develop your ongoing IaaS/PaaS security controls including vendor governance, vendor relationship management, and other internal practices to ensure continued and maintained security of your cloud environment. http://www.infotech.com/research/iaas-and-paas-security-governance-program-template
	IaaS and PaaS Service Level Agreement Template	The IaaS/PaaS Service Level Agreement Template provides a template format for Security to document their requirements in a service level agreement format so that it can be distributed and communicated to the necessary internal stakeholders and potential cloud vendors. http://www.infotech.com/research/iaas-and-paas-service-level-agreement-template
Blueprint: Develop and Deploy Security Policies		
	Develop and Deploy Security Policies	Comprehensively developed and effectively deployed security policies enable IT professionals to work pro-actively rather than reactively, benefitting the entire organization, not only IT. Formally documented and enforced policies are key to demonstrating due diligence, proactive threat reduction, and overall compliance consistency. http://www.infotech.com/research/develop-and-deploy-security-policies
	Storyboard: Develop and Deploy Security Policies	Formally documented and enforced policies are key to demonstrating due diligence, proactive threat reduction, and overall compliance consistency. This blueprint is designed to help you formalize your policies in order to enhance your organization's security posture and operational efficiency. http://www.infotech.com/research/storyboard-develop-and-deploy-security-policies

	Access Control Policy Template	The Access Control policy ensures users have the appropriate access levels specifically authorized to them to access information on systems and applications. http://www.infotech.com/research/access-control-policy-template
	Asset Management Policy Template	The Asset Management policy ensures assets are identified appropriately and the proper protection controls for those assets are in place. http://www.infotech.com/research/asset-management-policy-template
	Communications Security Policy Template	The Communications Security policy ensures security is a key consideration in network management and in the transfer of information in and out of the organization. http://www.infotech.com/research/communications-security-policy-template
	Compliance Policy Template	The purpose of the Compliance policy is to ensure proper measures are in place to avoid non-adherence to information security compliance - legal, contractual, regulatory or otherwise. http://www.infotech.com/research/compliance-policy-template
	Cryptography Policy Template	This Cryptography policy ensures correct use of cryptography to protect the confidentiality, authenticity and integrity of the organization's information. http://www.infotech.com/research/cryptography-policy-template
	Human Resources Security Policy Template	The Human Resource Security policy is to ensure personnel, including contractors, are aware of and understand their responsibilities in regards to security. http://www.infotech.com/research/human-resources-security-policy-template
	Information Security Aspects of Business Continuity Planning Policy Template	The Information Security Aspects of BCP policy ensures that information security is properly addressed within the organization's Business Continuity Planning (BCP) strategy. http://www.infotech.com/research/information-security-aspects-of-business-continuity-planning-policy-template
	Information Security Incident Management Policy Template	The Information Security Incident Management policy ensures proper recognition, management and communication of security events and weaknesses through a formal process. http://www.infotech.com/research/information-security-incident-management-policy-template
	Information Security Policy Charter Template	The Information Security Policy Charter is the 'policy of policies' which outlines high-level security governance within the organization and the expectations associated with the individual security policies. http://www.infotech.com/research/information-security-policy-charter-template
	IT Security Risk Strategy Policy Template	The IT Security Risk Strategy policy ensures adequate processes and controls are in place to mitigate risks and measure progress related to security performance. http://www.infotech.com/research/it-security-risk-strategy-policy-template
	Operations Security Policy Template	The Operations Security policy ensures the secure operations of information processing facilities within and related to your organization. http://www.infotech.com/research/operations-security-policy-template
	Organization of Information Security Policy Template	The Organization of Information Security policy ensures a framework is present that includes information security within internal and remote operations. http://www.infotech.com/research/organization-of-information-security-policy-template

	Physical and Environmental Security Policy Template	The Physical and Environmental Security policy ensures proper measures are in place to prevent unauthorized physical access or damage to the organization's information and facilities. http://www.infotech.com/research/physical-and-environmental-security-policy-template
	Security in Supplier Relationships Policy Template	The Security in Supplier Relationships policy ensures proper protection of your organization's assets that are accessed by suppliers. http://www.infotech.com/research/security-in-supplier-relationships-policy-template
	Security Policy Assessment Tool	Use this tool to identify which policies and actions are required to meet the security governance requirements of your organization. Determine the order in which to unroll the new policies to users and evaluate the effectiveness of the policies after deployment. http://www.infotech.com/research/security-policy-assessment-tool
	Security Policy Awareness and Training Deck	Policies are powerless if users are not aware and trained on how to comply with them. Use this template to communicate the purpose and expectations of your security policies, while ensuring due diligence and improving awareness, understanding, and compliance. http://www.infotech.com/research/security-policy-awareness-and-training-deck
	Security Policy Stakeholder Communication Template	The Stakeholder Communication Template will allow you to justify the need for security policies and formally acquire senior management approval to initiate policy development and deployment. http://www.infotech.com/research/security-policy-stakeholder-communication-template
	System Acquisition, Development, and Maintenance Security Policy Template	The System Acquisition, Development, and Maintenance Security policy ensures information is a forefront consideration throughout the lifecycle of information systems in the organization. http://www.infotech.com/research/system-acquisition-development-and-maintenance-security-policy-template
Blueprint: Build a Security Governance and Management Plan		
	Build a Security Governance and Management Plan	Many organizations currently take an ad hoc approach to security governance and management, which leads to several problems. http://www.infotech.com/research/build-a-security-governance-and-management-plan
	Storyboard: Build a Security Governance and Management Plan	Most organizations perceive security governance and management to be a time consuming and expensive endeavor. However, a customized program will provide results with a relatively low investment. http://www.infotech.com/research/storyboard-build-a-security-governance-and-management-plan
	Security Governance and Management Challenge Analysis Tool	Use this tool to help you organize and prioritize your current security governance and management challenges. http://www.infotech.com/research/security-governance-and-management-challenge-analysis-tool
	Security Governance and Management Target State Framework and Gap Analysis	Use this tool to build your target state information security governance and management framework and conduct a gap analysis. http://www.infotech.com/research/security-governance-and-management-target-state-framework-and-gap-analysis

	Information Security Incident Response Process Template	Use this template to define a specific process for managing information security incidents to minimize its impact on the organization. http://www.infotech.com/research/information-security-incident-response-process-template
	Information Security Training Tool	Use this tool to determine your organization's security training and awareness needs to begin building your training and awareness program. http://www.infotech.com/research/information-security-training-tool
	Security Governance and Management Metrics Tool	This tool will help you build a security metrics program. http://www.infotech.com/research/security-governance-and-management-metrics-tool
	Security Pressure Posture Analysis Tool	Security pressure posture analysis helps your organization assess your real security context and enables your organization to invest in the right security functions while balancing the cost and value in alignment with business strategies. http://www.infotech.com/research/security-pressure-posture-analysis-tool
	Security Governance and Management Implementation Roadmap	Use this tool to build a roadmap to help you reach your target state. http://www.infotech.com/research/security-governance-and-management-implementation-roadmap
	Information Security Compliance Template	Use this template to manage your information security compliance requirements. http://www.infotech.com/research/information-security-compliance-template
	Security Service Catalog Template	Use this catalog template to create a formal list of information security services offered and service level agreements. http://www.infotech.com/research/security-service-catalog-template
	Information Security Governance and Management Business Case Template	Use this template to justify the business value of implementing or improving a security governance and management program. http://www.infotech.com/research/information-security-governance-and-management-business-case-template
	Information Security Charter	Use this template to help you build an information security charter for your organization. http://www.infotech.com/research/information-security-charter
	Security Governance Organizational Structure	Use this template to help you formalize your organization's information security organizational structure. http://www.infotech.com/research/security-governance-organizational-structure
	Information Security Risk Management Template	Use this template to build your information security risk management process. http://www.infotech.com/research/information-security-risk-management-template
	ISO 27001:2013 Annex A Self-Check List	Use this check list to assess your CMM level based on ISO 27001:2013. http://www.infotech.com/research/iso-27001-2013-annex-a-self-check-list
	Security Governance and Management Communication Plan	This template will help you organize your various security communication efforts with different stakeholders. http://www.infotech.com/research/security-governance-and-management-communication-plan
	MSSP RFP Template	An RFP is a formal invitation issued by a business or agency requesting interested vendors to submit written proposals meeting a particular set of requirements. This template helps you to choose the right MSSP partner if you are planning to outsource any security functions. http://www.infotech.com/research/mssp-rfp-template

	Physical Access Policy Template	Physical access controls define who is allowed physical access to facilities that house information systems, and to the information systems within those facilities and/or the display mechanisms associated with those information systems. Without physical access controls, the potential exists for information systems to be illicitly accessed and the security of the housed information could be compromised. http://www.infotech.com/research/physical-access-policy-template
	Building an Enterprise IT Security Training Program	Over 50% of security breaches are a result of end-user error, oversight, and ignorance. IT security training is an effective method of reducing end-user related security breaches. Watch this video and review the other materials in the solution set to create an effective IT Security Training Program. http://www.infotech.com/research/building-an-enterprise-it-security-training-program
	Security Policy Implementation Tool	In most cases, using a phased implementation approach for Security Policy allows enterprises to begin to reap policy benefits quickly without causing the massive culture shift associated with an en masse deployment. Determining which Policies to implement in what order becomes key to the success of such a deployment. http://www.infotech.com/research/security-policy-implementation-tool
	Secure Acquisitions Policy Template	When acquiring information systems, following set protocols ensures that expenditures are made as wisely as possible regarding the provisioning of IT security. Without such protocols, the potential exists for purchases to be made that undermine defined security requirements. Thus, the risk level could be increased, and an additional purchase to re-establish an appropriate security level may be required. http://www.infotech.com/research/secure-acquisitions-policy-template
	Risk Assessment Policy Template	Risk assessments are used to determine the likelihood and magnitude of information system harm, in the event of a security breach. This in turn determines how much of that risk should be mitigated and what controls should be used to achieve that mitigation. Without risk assessments, the potential exists for organizations to leverage inappropriate (i.e. either too strict or too lax) security controls to protect information systems. http://www.infotech.com/research/risk-assessment-policy-template
	Security Assessment Policy Template	Security assessments are focused on determining if information system security controls are correctly implemented, operating as intended, and are producing the desired level of security. Without Security assessments, the potential exists for information systems to not be as secure as intended or desired. http://www.infotech.com/research/security-assessment-policy-template
	Data Protection Policy Template	Data protection mechanisms allow a greater level of security for information than can be achieved with system-based protection mechanisms alone. Without data protection mechanisms, the potential exists that information assets could be exposed to an unnecessarily high level of risk, particularly in circumstances where those assets are taken out of the information system. http://www.infotech.com/research/data-protection-policy-template

	Physical Access Policy Template	Physical access controls define who is allowed physical access to facilities that house information systems, and to the information systems within those facilities and/or the display mechanisms associated with those information systems. Without physical access controls, the potential exists for information systems to be illicitly accessed and the security of the housed information could be compromised. http://www.infotech.com/research/physical-access-policy-template
	Incident Response Policy Template	Incident response capabilities are used for monitoring security incidents, determining the magnitude of the threat, and responding promptly. If a security incident occurs, without an incident response capability in place, the incident will go unnoticed and the magnitude of harm associated with the incident will be significantly greater than if the incident were noted and corrected. http://www.infotech.com/research/incident-response-policy-template
	Contingency Planning Policy Template	Contingency plans are used to establish how information systems will continue to operate in the event of a catastrophic failure of the system or associated components. Without a clear contingency plan, the enterprise will not be prepared to recover from a catastrophic system failure, and information systems may remain unavailable for a prolonged period of time. http://www.infotech.com/research/contingency-planning-policy-template
	Systems Configuration Policy Template	Security Policy is the formal documentation that indicates how employees should act to uphold enterprise security. Building Security Policy is shown to reduce the occurrence of breaches by as much as 93%, but development can cost, on average, $50,000 and takes six months to complete. Use this template as a component of a complete Policy and reduce the impact of cost. http://www.infotech.com/research/systems-configuration-policy-template
	Systems Maintenance Policy Template	Security Policy is the formal documentation that indicates how employees should act to uphold enterprise security. Building Security Policy is shown to reduce the occurrence of breaches by as much as 93%; however, development costs, on average, $50,000 and takes six months. Info-Tech's customizable Systems Maintenance Policy Template can be used as a component of a complete Policy that allows enterprises to avoid those costs. http://www.infotech.com/research/systems-maintenance-policy-template
	Systems Monitoring and Auditing Policy Template	System monitoring and auditing is used to determine if inappropriate actions have occurred within an information system. System monitoring is used to look for these actions in real time while system auditing looks for them after the fact. Without system monitoring and auditing it can be difficult to determine when a failure of the information system security, or a breach of the information systems itself, has occurred, and the details of that breach or failure. http://www.infotech.com/research/systems-monitoring-and-auditing-policy-template
	Security Infrastructure Policy Template	Security infrastructure allows information systems to be provided a greater level of security than can be achieved through configuration control alone by delivering enhanced security capabilities. Without dedicated infrastructure, the potential exists that security vulnerabilities, which cannot be mitigated by the capabilities inherent in information systems, will be exploited leading to compromise of information system security. http://www.infotech.com/research/security-infrastructure-policy-template

	Application Security Policy Template	Using pre-defined app dev principles and procedures, applications should be designed and implemented as securely as possible. Without secure app dev, the potential exists for an application component of an information system to be constructed with flaws or other weaknesses, which could allow for the subversion of the app and the contravening of other security controls. http://www.infotech.com/research/application-security-policy-template
	Acceptable Usage Policy Template	Acceptable usage policies clearly indicate what information system users are and are not allowed to do. Without these policies, the potential exists that users could violate information security and avoid punitive actions by claiming to not know about any restrictions in place. Use this and the related templates to build an efficient and effective enterprise Security Policy. http://www.infotech.com/research/acceptable-usage-policy-template
	Account Management Policy Template	Information system accounts are the only legitimate method by which information systems may be accessed. Without active account management, the potential exists that legitimate users can use these accounts for illegitimate purposes. Additionally, the potential exists that these accounts can be usurped and used illegitimately to access information systems. http://www.infotech.com/research/account-management-policy-template
	Authorization, Identification & Authentication Policy Template	The use of authorization, identification and authentication controls ensures that only known users make use of information systems. Without authorization, identification and authentication controls, the potential exists that information systems could be accessed illicitly and that the security of those information systems be compromised. http://www.infotech.com/research/authorization-identification-authentication-policy-template
	Authorization, Identification & Authentication Policy Template	The use of authorization, identification and authentication controls ensures that only known users make use of information systems. Without authorization, identification and authentication controls, the potential exists that information systems could be accessed illicitly and that the security of those information systems be compromised. http://www.infotech.com/research/authorization-identification-authentication-policy-template
Blueprint: Build a Security Architecture & Roadmap		
	Build a Security Architecture & Roadmap	This solution set will guide you through the process of developing a formal plan that outlines and guides security infrastructure acquisitions. http://www.infotech.com/research/build-an-enterprise-security-plan
	Risk Assessment Policy Template	Risk assessments are used to determine the likelihood and magnitude of information system harm, in the event of a security breach. This in turn determines how much of that risk should be mitigated and what controls should be used to achieve that mitigation. Without risk assessments, the potential exists for organizations to leverage inappropriate (i.e. either too strict or too lax) security controls to protect information systems. http://www.infotech.com/research/risk-assessment-policy-template
	Security Assessment Policy Template	Security assessments are focused on determining if information system security controls are correctly implemented, operating as intended, and are producing the desired level of security. Without Security assessments, the potential exists for information systems to not be as secure as intended or desired. http://www.infotech.com/research/security-assessment-policy-template

Blueprint: Secure Your Public IaaS		
	Secure Your Public IaaS	With the high focus on security in today's digital world, one mistake by one person can often be the downfall of an organization, not to mention that person's career. http://www.infotech.com/research/secure-your-public-iaas
Blueprint: Information Security		
	Information Security	Your ad hoc technology solutions are not adequate enough for today's threat landscape. A comprehensive security strategy and roadmap is essential to secure your organization's information and systems. http://www.infotech.com/research/information-security--2
Blueprint: Build an Enterprise IT Security Training Program		
	Build an Enterprise IT Security Training Program	This solution set will guide the enterprise through the process of developing and delivering a security awareness training program that ensures staff are not the weakest link in the security chain. http://www.infotech.com/research/provide-it-security-training
Blueprint: Develop and Deploy Effective Security Policies		
	Develop and Deploy Effective Security Policies	Get your security policies created (or optimized) using our security policy blueprint which will not only provide the security policy templates, but also the guidance to make sure you're not wasting time on overly complicated policies or policies you don't actually need. http://www.infotech.com/research/develop-and-deploy-effective-security-policies
Blueprint: Develop & Deploy a Security Policy		
	Security Policy Implementation Guide	Creating a security policy can be a lot of work, but until that policy is implemented, it will provide no benefit. While that implementation process can be time-consuming, it does not have to be overly complex. Use this tool to determine the order with which changes should be implemented. http://www.infotech.com/research/security-policy-implementation-guide
	Data Center Evacuation Guidelines	No DRP is complete without an emergency evacuation plan for the data center. This template is designed to act as a starting point for developing an evacuation plan for data center staff. http://www.infotech.com/research/data-center-evacuation-guidelines
	Instant Messaging Security Policy	When implementing enterprise instant messaging (IM), a security policy ensures that users understand and comply with security measures that IT has devised. Rein in IM security risks in by downloading and tailoring this IM security policy. http://www.infotech.com/research/instant-messaging-security-policy
	Security Incident Report Form	Download this form to document and report key IT security incidents to senior management. http://www.infotech.com/research/security-incident-report-form
	Server Backup Policy	Be sure to download Info-Tech's server backup policy as a starting point to developing your own policy. http://www.infotech.com/research/server-backup-policy
	Incident Log Form	Include this Info-Tech incident log form in your incident response arsenal. http://www.infotech.com/research/incident-log-form

Blueprint: Optimize Security Operations without Overspending		
	Optimize Security Operations without Overspending	Be more secure without spending more by implementing just enough security operations function (SOF) instead of building a security operations center (SOC) you might not need. Protect what matters: don't over-invest or under-invest in the security operation function. Spend your money and time wisely and choose the right fit for your organization. http://www.infotech.com/research/optimize-security-operations-without-overspending
	Storyboard: Optimize Security Operations without Overspending	Be more secure without spending more by implementing just enough Security Operations Function (SOF) instead of building a Security Operations Center (SOC) you might not need. Protect what matters: don't over-invest or under-invest in the security operation function. Spend your money and time wisely and choose the right fit for your organization. http://www.infotech.com/research/storyboard-optimize-security-operations-without-overspending
	Security Challenge Analysis Tool	A holistic challenge analysis helps you understand explicit and hidden challenges and helps you allocate your resources more effectively across three domains: technology, process, and people. http://www.infotech.com/research/security-challenge-analysis-tool
	Security Pressure Posture Analysis Tool	Security pressure posture analysis helps your organization assess your real security context and enables your organization to invest in the right security functions while balancing the cost and value in alignment with business strategies. http://www.infotech.com/research/security-pressure-posture-analysis-tool
	SOF Gap Analysis Tool	The tool is designed to help you understand your security function target and current status and identify the gap accordingly with respect to technology, process, and people. http://www.infotech.com/research/sof-gap-analysis-tool
	In-House vs. Outsourcing Decision-Making Tool	The In-House vs. Outsourcing Decision-Making Tool is designed to help organizations analyze the cost and risk management effectiveness for security capabilities with respect to in-house implementation or outsourcing. http://www.infotech.com/research/in-house-vs-outsourcing-decision-making-tool
	SOF Roadmap Building Tool	The tool will help you to establish a high-level roadmap for your SOF initiatives with respect to technology, process and people in a three-year term. http://www.infotech.com/research/sof-roadmap-building-tool
	Security Metrics Program Building Tool	An appropriate security metrics program help you to be in strategic alignment with business objectives and to control security risks in a more cost-effective fashion. This tool is designed to help you identify and build up a right-sized security metrics program for your organization. http://www.infotech.com/research/security-metrics-program-building-tool
	SOF Vision, Mission, and Responsibilities Statement Template	The vision, mission, and responsibilities statement encapsulates the basic driving principles behind any organization. In order to set a sound strategy, it's essential that you understand the value of security operations function (SOF) and what role SOF is going to play in your organization. http://www.infotech.com/research/sof-vision-mission-and-responsibilities-statement-template

	MSSP RFP Template	An RFP is a formal invitation issued by a business or agency requesting interested vendors to submit written proposals meeting a particular set of requirements. This template helps you to choose the right MSSP partner if you are planning to outsource any security functions. http://www.infotech.com/research/mssp-rfp-template
	SOF Business Case Template	This SOF Business Case Template will help build a living and convincing Security Operations Function (SOF) business plan for the enterprise as well as document business justifications for specific near-term SOF-related projects. http://www.infotech.com/research/sof-business-case-template
	SOF Project Charter Template	A project charter serves several important functions. It organizes the project so that you can make efficient and effective resource allocation decisions. It also communicates important details on the project purpose, scope definition, and the project parameters. This template is designed to help you build a SOF project charter in a timely manner. http://www.infotech.com/research/sof-project-charter-template
Blueprint: Secure Critical Systems and Intellectual Property Against APT		
	Secure Critical Systems and Intellectual Property Against APT	This blueprint will determine your enterprise risk for an APT, identify what is needed, and create an action plan to build an effective APT security system. This blueprint is an opportunity for organizations to thoroughly secure their vital systems and IP to remain competitive. http://www.infotech.com/research/secure-critical-systems-and-intellectual-property-against-apt
	Storyboard: Secure Critical Systems and Intellectual Property Against APT	Defending against Advanced Persistent Threats (APT) is not optional; you're likely already being hacked and simply don't know it. http://www.infotech.com/research/storyboard-secure-critical-systems-and-intellectual-property-against-apt
	Current APT Security Measures Assessment Tool	This tool provides a step by step comprehensive assessment, identification and prioritization process to secure against APTs. The final outcome is the identification of the most critical security measures your organization must implement in order to secure your organization from APTs. http://www.infotech.com/research/current-apt-security-measures-assessment-tool
	Attack Pyramid Tracking Tool	This tool enables the member to track how an attack was performed across the organization while accounting for different phases of an attack and the different planes of which an attack can occur on. http://www.infotech.com/research/attack-pyramid-tracking-tool
	APT Cost Calculator	Use Info-Tech's APT Cost Calculator to estimate your specific costs to implement your layered defense and security structure based on the outputs of this blueprint, Secure Critical Systems and Intellectual Property Against APT. http://www.infotech.com/research/apt-cost-calculator
	Access Control Template	This template is meant to be a starting point to determine who should have access to what. It identifies the stakeholder's position and responsibility, and then determines subsequent required access levels. http://www.infotech.com/research/access-control-template
	Incident Response Policy Template	Incident response capabilities are used for monitoring security incidents, determining the magnitude of the threat, and responding promptly. If a security incident occurs, without an incident response capability in place, the incident will go unnoticed and the magnitude of harm associated with the incident will be significantly greater than if the incident were noted and corrected. http://www.infotech.com/research/incident-response-policy-template

	Systems Monitoring and Auditing Policy Template	System monitoring and auditing is used to determine if inappropriate actions have occurred within an information system. System monitoring is used to look for these actions in real time while system auditing looks for them after the fact. Without system monitoring and auditing it can be difficult to determine when a failure of the information system security, or a breach of the information systems itself, has occurred, and the details of that breach or failure. http://www.infotech.com/research/systems-monitoring-and-auditing-policy-template
	Security Infrastructure Policy Template	Security infrastructure allows information systems to be provided a greater level of security than can be achieved through configuration control alone by delivering enhanced security capabilities. Without dedicated infrastructure, the potential exists that security vulnerabilities, which cannot be mitigated by the capabilities inherent in information systems, will be exploited leading to compromise of information system security. http://www.infotech.com/research/security-infrastructure-policy-template
	Authorization, Identification & Authentication Policy Template	The use of authorization, identification and authentication controls ensures that only known users make use of information systems. Without authorization, identification and authentication controls, the potential exists that information systems could be accessed illicitly and that the security of those information systems be compromised. http://www.infotech.com/research/authorization-identification-authentication-policy-template
	Incident Response Policy Template	Incident response capabilities are used for monitoring security incidents, determining the magnitude of the threat, and responding promptly. If a security incident occurs, without an incident response capability in place, the incident will go unnoticed and the magnitude of harm associated with the incident will be significantly greater than if the incident were noted and corrected. http://www.infotech.com/research/incident-response-policy-template
Additional Resources		
	Cyber Threat Employee Education Training Slideshow	Customize this PowerPoint deck to suit your organization's needs for employee education on what an APT is and why it matters to them. http://www.infotech.com/research/cyber-threat-employee-education-training-slideshow

Security Research

Security: Asset Security

Type	Document	Description
Blueprint: Build an Optimal Digital Asset Security Services Plan		
	Build an Optimal Digital Asset Security Services Plan	This blueprint comprehensively develops an optimal asset security services plan for your organization so that you secure what is most important. Identity what is critical, analyze their life cycle, assess your current asset security, prioritize your gaps and develop an action plan. http://www.infotech.com/research/build-an-optimal-digital-asset-security-services-plan
	Storyboard: Build an Optimal Digital Asset Security Services Plan	Identify how asset security fits into your total security picture and recognize the major shifting trends in cyber security and ever-growing severity of risks. Identify your rationale for the undertaking of an asset security project for easy communication and understanding. http://www.infotech.com/research/storyboard-build-an-optimal-digital-asset-security-services-plan
	Digital Asset Security Optimization Tool	This is a comprehensive tool designed to identity your digital assets, evaluate their enterprise value, perform a life cycle analysis, assess your current asset security, identify your asset security gaps, and then prioritize those gaps. http://www.infotech.com/research/digital-asset-security-optimization-tool
	Responsibility and Ownership Allocation Template (RACI Model)	This tool will help you allocate ownership and responsibility for any new or existing security measures your enterprise has. Each specific security measure has specific persons allocate their time and effort to it. Each measure has its responsibility and accountability allocated to persons. http://www.infotech.com/research/responsibility-and-ownership-allocation-template-raci-model
Vendor Landscape: Endpoint Encryption		
	Vendor Landscape: Endpoint Encryption	Many enterprises have little to no exposure to encryption technologies, so therefore have no grounding in how to pick the best solution for their needs. http://www.infotech.com/research/select-an-enterprise-endpoint-encryption-solution
	Vendor Landscape Storyboard: Endpoint Encryption	Sophos led the pack with a well-rounded Endpoint Encryption solution, but vendor selection isn't just about the resulting leader. Competitors provide legitimate alternatives based on the organization's specific functional requirements. http://www.infotech.com/research/it-storyboard-select-an-enterprise-endpoint-encryption-solution
	Endpoint Encryption Evaluation & RFP Response Tool	This tool is pre-built with the essential criteria that should be considered when evaluating RFP responses. Use this tool to put hard numbers behind vendor claims, and keep evaluations objective by scoring RFP responses. http://www.infotech.com/research/it-endpoint-encryption-evaluation-rfp-response-tool
	Endpoint Encryption Vendor Shortlist Tool	This tool allows enterprises to generate a customized shortlist of Endpoint Encryption vendors based on required capabilities and future requirements for areas such as file/folder encryption, removable devices encryption, and integration with BitLocker and self-encrypting drives. http://www.infotech.com/research/it-endpoint-encryption-vendor-shortlist-tool

Type	Document	Description
	Endpoint Encryption Solution RFP Template	Issuing RFPs is a critical step in your vendor selection process. This RFP template comes populated with important elements you don't want to forget. A detailed RFP saves time in the selection process and ensures that you select a best-fit solution for the organization. http://www.infotech.com/research/it-endpoint-encryption-solution-rfp-template
	Internet Acceptable Use and Filtering Policy	All enterprises utilizing a web content filter must guide the productive use of Internet services through Internet Acceptable Use and Filtering Policies. Use this template to help keep the policy up-to-date. http://www.infotech.com/research/internet-acceptable-use-and-filtering-policy
	Web Content Filter Test Checklist	When testing a web content filter in-house, the process must be scripted and stringent to ensure fair scores across every product tested. Use this template to reduce the risk of bias by members of the team who have used other web content filters in the past. http://www.infotech.com/research/web-content-filter-test-checklist
	Internet Acceptable Use and Filtering Policy	All enterprises utilizing a web content filter must guide the productive use of Internet services through Internet Acceptable Use and Filtering Policies. Use this template to help keep the policy up-to-date. http://www.infotech.com/research/internet-acceptable-use-and-filtering-policy
Vendor Landscape: Data Loss Prevention		
	Vendor Landscape: Data Loss Prevention	As adversaries focus on stealing valuable data, and increasing compliance and regulatory requirements are needed to be met, protecting and securing data becomes more and more important. One of the key tools to ensuring the protection of enterprise data is Data Loss Prevention (DLP). http://www.infotech.com/research/it-vendor-landscape-data-loss-prevention
	Vendor Landscape Storyboard: Data Loss Prevention	Websense, Trend Micro, RSA, and McAfee lead the pack with well-rounded DLP solutions, but vendor selection isn't just about who the leader is. Competitors provide legitimate alternatives based on the organization's specific functional requirements. http://www.infotech.com/research/it-storyboard-select-an-enterprise-data-loss-prevention-solution
	Data Loss Prevention Vendor Shortlist & Detailed Feature Analysis Tool	This tool allows enterprises to generate a customized shortlist of data loss prevention vendors based on required capabilities and future requirements for mobile device support, sensitive data protection, and regulatory compliance. http://www.infotech.com/research/data-loss-prevention-vendor-shortlist-detailed-feature-analysis-tool
	Data Loss Prevention RFP Template	Use this template to invite prospective vendors to submit a proposal to supply a Data Loss Prevention (DLP) solution for your organization. http://www.infotech.com/research/data-loss-prevention-rfp-template
	Data Loss Prevention Vendor Demo Script	A template that can be used to help the IT department provide vendors with a consistent set of instructions ensuring an objective comparison of DLP product features. http://www.infotech.com/research/data-loss-prevention-vendor-demo-script

Additional Resources		
	Data Deduplication Matures Into the Mainstream	Data deduplication has become a mainstream component of backup software and disk-to-disk backup appliances, such as Virtual Tape Libraries (VTLs). It has proven to provide a means to streamline backups and save money for the enterprise. http://www.infotech.com/research/data-deduplication-matures-into-the-mainstream

Security: Identity Management

Type	Document	Description
Blueprint: Build an Identity Security Services Plan		
	Build an Identity Security Services Plan	You cannot begin to manage your users until you know who they are and can ensure they all have the correct levels of access. No matter the size of your organization, this can be a manageable task by focusing on critical applications and their user groups, optimizing what you currently have in place, and using that information, tackle the rest by focusing your efforts on the top 10 controls that most relate to your organization. http://www.infotech.com/research/build-an-identity-security-services-plan--3
	Storyboard: Build an Identity Security Services Plan	You cannot begin to manage your users until you know who they are and can ensure they all have the correct levels of access. No matter the size of your organization, this can be a manageable task. http://www.infotech.com/research/storyboard-build-an-identity-security-services-plan
	IAM Controls Analysis Tool	Conduct your current state analysis by recording what your organization is implementing today in terms of identity management policies, processes, and technologies. http://www.infotech.com/research/iam-controls-analysis-tool
	User Access Appropriateness Checklist	You need to be auditing your user groups, but not all user groups require similar analysis of their access levels. Streamline your audit and increase efficiency by sectioning user populations into four groups: internal, privileged (internal), remote, and external. http://www.infotech.com/research/user-access-appropriateness-checklist
	Identity and Access Management Policy	To have a true IAM strategy, it must be formalized within a policy to ensure appropriate and secure steps are followed in terms of authentication, authorization, etc. It is also a key document if auditing processes occur. http://www.infotech.com/research/identity-and-access-management-policy
Blueprint: Reduce IT Admin Risks & Costs with Privileged Access Management (PAM)		
	Reduce IT Admin Risks & Costs with Privileged Access Management (PAM)	Your internal employees have always been a vulnerability against your organization's overall security, but your privileged accounts are even more of a target because of their heightened level of access to sensitive data. PAM gives added visibility into the usage of these accounts and increased overall security. http://www.infotech.com/research/reduce-it-admin-risks-costs-with-privileged-access-management-pam
	Storyboard: Reduce IT Admin Risks and Costs with Privileged Access Management (PAM)	Internal employees are frequently a vulnerability against your organization's security, but your privileged accounts are even more of a target. PAM gives added visibility into the usage of these accounts and increased overall security. http://www.infotech.com/research/storyboard-reduce-it-admin-risks-and-costs-with-privileged-access-management-pam

Type	Document	Description
	Privileged Access Management (PAM) Project Charter Template	The Project Charter serves as your central repository for business requirements, implementation project steps, and more. It is ideal for auditing purposes. Bring it to stakeholders to gain PAM project support. http://www.infotech.com/research/privileged-access-management-pam-project-charter-template
	Privileged Access Management (PAM) RFP Template	A Request for Proposal (RFP) is a formal invitation issued by a business or agency requesting interested vendors to submit written proposals meeting a particular set of requirements. http://www.infotech.com/research/privileged-access-management-pam-rfp-template
	Privileged Access Management (PAM) ROI Calculator	The purpose of the Privileged Access Management (PAM) ROI Calculator is to help organizations get an estimation of the tangible benefits of implementing a PAM solution by calculating cost savings and overall ROI. http://www.infotech.com/research/privileged-access-management-pam-roi-calculator
	Privileged Access Management (PAM) Vendor Demo Script	Use this demonstration script to provide Privileged Access Management (PAM) solution vendors with a consistent set of instructions, ensuring an objective comparison of product features. http://www.infotech.com/research/privileged-access-management-pam-vendor-demo-script
	Stakeholder and Admin Privileged Access Management (PAM) Communication Decks	A significant component to the success of your Privileged Access Management (PAM) implementation is to achieve stakeholder sign-off, and get the support of admins who will be most affected by PAM. http://www.infotech.com/research/stakeholder-and-admin-privileged-access-management-pam-communication-decks
Blueprint: Use Multi-Factor Authentication to Save Costs and Secure Users		
	Use Multi-Factor Authentication to Save Costs and Secure Users	Passwords as the sole authenticator introduce risk to an organization. They're not enough on their own as they are subject to credential theft and create additional service desk work managing forgotten passwords. Implementing MFA adds a necessary layer to create more robust authentication methods. http://www.infotech.com/research/use-multi-factor-authentication-to-save-costs-and-secure-users
	Storyboard: Use Multi-Factor Authentication to Save Costs and Secure Users	Passwords as the sole authenticator introduce risk to an organization. They're subject to credential theft and create additional service desk work managing forgotten passwords. Understand how MFA can save your organization money by streamlining authentication and reducing the amount of help desk tickets related to password resets. http://www.infotech.com/research/storyboard-use-multi-factor-authentication-to-save-costs-and-secure-users
	MFA ROI Calculator	The purpose of the Multi-Factor Authentication (MFA) ROI Calculator is to help organizations estimate the tangible benefits of implementing an MFA solution by calculating cost savings and overall ROI. http://www.infotech.com/research/mfa-roi-calculator
	MFA Project Charter	The purpose of the Project Charter is to organize your project so that you can make efficient and effective resource allocation decisions. It helps to define the project, and it is a critical communication component. http://www.infotech.com/research/mfa-project-charter

Type	Document	Description
	MFA Policy	Implementing multi-factor authentication can mean additional considerations for users (e.g. if physical tokens are implemented, care of those tokens is important). Formalizing the process in a policy creates more accountability. http://www.infotech.com/research/mfa-policy
	MFA Stakeholder Communication Deck	A significant component to the success of your multi-factor authentication (MFA) implementation is to achieve stakeholder sign-off. By strategically communicating the value of the project â€" both qualitative and, most importantly, quantitative â€" you're more likely to get their support. http://www.infotech.com/research/mfa-stakeholder-communication-deck

Security: Network Security

Type	Document	Description
Blueprint: Securely Implement a SaaS Program		
	Securely Implement a SaaS Program	The business is adopting a SaaS program and that environment must be secured. Use the SaaS vendor to cover some security controls through contractual and configuration requirements to limit the internal controls that must be deployed. http://www.infotech.com/research/securely-implement-a-saas-program
	Storyboard: Securely Implement a SaaS Program	If you haven't been in cloud contract negotiations yet, you will be. SaaS adoption is happening; better get prepared for negotiations now. http://www.infotech.com/research/storyboard-securely-implement-a-saas-program
	Cloud Security CAGI Tool	The Cloud Security CAGI Tool is a unique security framework designed by Info-Tech that recommends various security requirements that must be met in order to ensure your SaaS cloud program security. http://www.infotech.com/research/cloud-security-cagi-tool
	SaaS Security Governance Program	The SaaS Security Governance Program Template will develop your SaaS security vendor governance and vendor relationship management practices to ensure continued and maintained security of your SaaS program. http://www.infotech.com/research/saas-security-governance-program
	SaaS Security Service Level Agreement Template	The SaaS Security SLA Template provides a format for security to document their requirements in a service level agreement format so that it can be distributed and communicated to the necessary internal stakeholders and potential cloud vendors. http://www.infotech.com/research/saas-security-service-level-agreement-template
Vendor Landscape: Secure Web Gateways		
	Vendor Landscape: Secure Web Gateways	Secure Web Gateways (SWGs) protect your organization from threats to your network or malicious outbound communication. Products vary in their ability to detect these threats and the environments that they support. With the increase of advanced malware, targeted attacks and the implication of heterogeneous networks, SWGs must be able to provide security across all an enterprise would see web traffic. http://www.infotech.com/research/vendor-landscape-secure-web-gateways
	Vendor Landscape Storyboard: Secure Web Gateways	Understand what's new in the Secure Web Gateway market and evaluate vendors and products for your enterprise needs. http://www.infotech.com/research/vendor-landscape-storyboard-secure-web-gateways

Type	Document	Description
	Secure Web Gateway RFP Template	A Request for Proposal is a formal invitation requesting interested vendors to submit written proposals meeting a set of requirements. Use this template to invite prospective vendors to submit a proposal to supply a Secure Web Gateway solution for your organization. http://www.infotech.com/research/secure-web-gateway-rfp-template
	Secure Web Gateway Vendor Demo Script	Use this template to help the IT department provide vendors with a consistent set of instructions ensuring an objective comparison of secure web gateway product features. http://www.infotech.com/research/secure-web-gateway-vendor-demo-script
	Secure Web Gateway Vendor Shortlist & Detailed Feature Analysis Tool	This worksheet allows enterprises to profile their Secure Web Gateway (SWG) requirements and generate a rank-ordered vendor shortlist from a fixed list of vendors. Vendor profiles are based on Info-Tech's recent in-depth review of the SWG market. http://www.infotech.com/research/secure-web-gateway-vendor-shortlist-detailed-feature-analysis-tool
Blueprint: Develop a Network Security Roadmap to Lower Incident Costs and Increase Efficiency		
	Develop a Network Security Roadmap to Lower Incident Costs and Increase Efficiency	Creating a security roadmap does not have to take a lot of time or money from consulting firms. You have all of the information you need available to you. Choose to do it yourself and save time, money, and effort. http://www.infotech.com/research/develop-a-network-security-roadmap-to-lower-incident-costs-and-increase-efficiency
	Storyboard: Develop a Network Security Roadmap to Lower Incident Costs and Increase Efficiency	Creating a security roadmap does not have to take a lot of time or money from consulting firms. Use your time and information you already have, and save. http://www.infotech.com/research/storyboard-develop-a-network-security-roadmap-to-lower-incident-costs-and-increase-efficiency
	Network Security Implementation Roadmap Tool	Create your own customized and prioritized network security roadmap based on your business requirements, security priorities, and current technologies through a series of straight-forward questions. http://www.infotech.com/research/network-security-implementation-roadmap-tool
	Network Security Communication and Business Justification Deck	A significant part of the effort in ensuring your network security roadmap is successful involves obtaining stakeholder support. Achieve buy-in by communicating with them in their language, anticipating their questions, and providing answers and solutions. http://www.infotech.com/research/network-security-communication-and-business-justification-deck
Blueprint: Develop a User Management Strategy		
	Develop a User Management Strategy	Ensuring solid security and compliance means building a comprehensive and well-thought-out User Management strategy, and doing it without breaking the bank. http://www.infotech.com/research/it-develop-a-user-management-strategy
	Storyboard: Develop a User Management Strategy	A user management strategy, along with formalized policies and procedures, set the organization up for success in onboarding employees, preventing unauthorized data access, compliance audits, and even adopting new technologies. http://www.infotech.com/research/it-storyboard-develop-a-user-management-strategy

Type	Document	Description
	User Management Strategy RFI Template	This RFI template is designed to help solicit information from user management tool vendors on what types of user management tools are best suited for your environment and situation based on the information provided to the vendor. http://www.infotech.com/research/it-user-management-strategy-rfi-template
	Create & Maintain an Effective User Management Strategy	A comprehensive user management strategy, united with formalized policies and procedures, will set the enterprise up for success with onboarding of employees, preventing unauthorized data access, compliance audits, as well as the adoption of new technologies. http://www.infotech.com/research/it-create-maintain-an-effective-user-management-strategy
Blueprint: Develop an Up-to-Date Active Directory Strategy, and Implement		
	Develop an Up-to-Date Active Directory Strategy, and Implement	Microsoft's Active Directory (AD) is the primary administrative engine for both systems and users in enterprises of all sizes. http://www.infotech.com/research/develop-an-up-to-date-active-directory-strategy-and-implement-accordingly
	Storyboard: Develop an Up-to-Date Active Directory Strategy, and Implement	Active Directory is, for many enterprises, the only security management tool in place. Even for those organizations that make use of more advanced solutions, Active Directory is a significant part of the management infrastructure. Knowing how to best make use of the tool is of paramount importance to enterprises of all sizes and complexity levels. http://www.infotech.com/research/storyboard-develop-an-up-to-date-active-directory-strategy-and-implement
	Active Directory Migration Readiness Tool	Getting maximum functionality out of Active Directory is essential for all enterprises that make use of it as it serves as one of the primary, if not only, security management tools for most enterprises. Understanding the complexities of architecture, feature functionality, and upgrade paths is key. http://www.infotech.com/research/active-directory-migration-readiness-tool
	Security Information & Event Management RFP Scoring Tool	For organizations that have issued a formal Request for Proposal (RFP) to evaluate Security Information & Event Management (SIEM) vendors, gathering and scoring the various responses can be difficult and time consuming. This tool enables enterprises to evaluate and compare the results of an SIEM RFP process quickly and easily. http://www.infotech.com/research/it-security-information-event-management-siem-rfp-scoring-tool
	PDA Usage Policy and Agreement	Clamp down on rogue PDA implementations and leverage the business utility of this rapidly evolving class of devices by tailoring and deploying this policy throughout the organization. http://www.infotech.com/research/pda-usage-policy-and-agreement
	Active Directory Strategy and Migration	Getting maximum functionality out of Active Directory is essential for all enterprises that make use of it as it serves as one of the primary, if not only, security management tools for most enterprises. Understanding the complexities of architecture, feature functionality, and upgrade paths is key. http://www.infotech.com/research/active-directory-strategy-and-migration
Blueprint: Federate IAM for and from the Cloud		
	Federate IAM for and from the Cloud	You need an IAM plan. Managing your users' identities can consume a large amount of time, money, and resources. To save in these three areas, and protect your systems, you must have an identity and access management (IAM) strategy. http://www.infotech.com/research/it-federate-iam-for-and-from-the-cloud

Type	Document	Description
	Storyboard: Federate IAM for and from the Cloud	Managing your users' identities can consume a large amount of time, money, and resources. To save costs, and make security more of a priority, you must have an identity and access management (IAM) strategy that supports your cloud strategy. http://www.infotech.com/research/it-storyboard-federate-iam-for-and-from-the-cloud
	IAM Decision Tree	This decision tree (flowchart) allows organizations to determine where they are currently located in terms of identity management strategies, and where they need to go to get to a full-fledged solution. http://www.infotech.com/research/it-iam-decision-tree
	Identity and Access Management (IAM) Policy	Regardless of the technologies involved in an IAM strategy, IAM-related responsibilities must be formalized within a policy to ensure appropriate and secure steps are followed for authentication, authorization, and auditing. http://www.infotech.com/research/identity-and-access-management-iam-policy-template
Blueprint: Secure the Network Against Remote & Rogue Endpoints in Four Steps		
	Secure the Network Against Remote & Rogue Endpoints in Four Steps	NAC has had a bad past - difficulty of implementation and little-to-no-ROI meant most organizations sought more cost effective security solutions. But as possible use cases expand with BYOD, it is time to revisit NAC to keep your resources secure. http://www.infotech.com/research/secure-the-network-against-remote-rogue-endpoints-in-four-steps
	Storyboard: Secure the Network Against Remote & Rogue Endpoints in Four Steps	Challenges stemming from the proliferation of mobile devices, both corporate- and employee-owned, in organizations should have most businesses at least (re)considering NAC as a method for securing corporate resources. http://www.infotech.com/research/storyboard-secure-the-network-against-remote-rogue-endpoints-in-four-steps
	NAC Capture Tool	The NAC Capture Tool allows organizations to determine their current security status in terms of NAC feature sets and how to go from partial NAC functionality to a full-fledged NAC implementation. http://www.infotech.com/research/nac-capture-tool
	WLAN TCO/ROI Calculator	Calculating the Return on Investment (ROI) and Total Cost of Ownership (TCO) of any technology is essential prior to adoption. Introduce this Excel-based TCO/ROI calculator to your Wireless LAN (WLAN) strategic planning exercises. http://www.infotech.com/research/wlan-tcoroi-calculator
	NAC Action Plan	Maintaining your NAC-related data in one central location is key in ensuring the success of your NAC implementation efforts. This not only helps in remaining organized through the process, it helps revisit your goals and re-evaluate your technology and processes. http://www.infotech.com/research/nac-action-plan
	Capture Current and Desired NAC Capabilities	This exercise is part of the overall workshop - specifically centered around the current state examination. Using these handouts, the facilitator will take the group through determining where the organization is in terms of LAN, WLAN, BYOD and remote access NAC capabilities. http://www.infotech.com/research/capture-current-and-desired-nac-capabilities

Blueprint: Select and Implement an Email Security Gateway		
	Select and Implement an Email Security Gateway	ESG solutions must maintain conventional email security against vast amounts of spam and malware and must be equipped to detect spear phishing attacks while enabling easy management and easy reporting. http://www.infotech.com/research/select-and-implement-an-email-security-gateway
	Storyboard: Select and Implement an Email Security Gateway	This Blueprint covers the complete process of evaluating your organization's ESG requirements, properly selecting the best ESG solution and vendor, implementing your new or updated ESG, and developing processes to ensure sustained email security. http://www.infotech.com/research/storyboard-select-and-implement-an-email-security-gateway
	Email Security Gateway Financial Calculator	The manner in which an organization's email is cleaned and secured can either be an unnoticed cost or high value savings. A major security challenge faced by SMBs is limited IT security budgets. Having accurate TCOs and ROIs gives credibility and shows value to decision makers who control budgets. A comprehensive evaluation of all potential benefits and costs of email deployment solutions and security systems will enable you to provide financial reasoning and evidence when decision making. http://www.infotech.com/research/email-security-gateway-financial-calculator
	Email Incident Event Analysis Tool	This tool develops visibility and measurability into the current status of your organization’s email. Knowing the key indicators of your email security effectiveness will allow you to clearly communicate goals and achievements. http://www.infotech.com/research/email-incident-event-analysis-tool
	ESG Requirements Gathering Tool	Too often, the determination of what security features an organization needs can become clouded by what is available. This tool assess your requirements based on the possible solution that would be provided by that given feature. This differs from other requirement gatherings that will ask if a given feature is needed. The concept is that you can objectively find out what your organization needs regardless of what that feature is. This tool will assess the security features your organization requires based on a series of objective questions designed not to lead your decision. http://www.infotech.com/research/esg-requirements-gathering-tool
	ESG Business Case and Operations Plan	The Email Security Gateway (ESG) Business Case & Operations Plan acts as a reference guide for information gathered during the Select and Implement an Email Security Gateway project and with the various tools used throughout. It also serves as a central repository for information that will be pertinent to your organization’s organizational and architectural requirements, your progress towards procuring an ESG and incident response/containment, plus metrics. http://www.infotech.com/research/esg-business-case-and-operations-plan
	Vendor Landscape Storyboard: Email Security Gateway	Email security gateway solutions must maintain conventional email security against vast amounts of spam and malware, as well as being equipped to detect spear phishing attacks while enabling easy management and easy reporting. http://www.infotech.com/research/vendor-landscape-storyboard-email-security-gateway

Blueprint: Select and Implement Intrusion Detection and Prevention Systems		
	Select and Implement Intrusion Detection and Prevention Systems	Today's threat landscape is more unpredictable than ever. IDPS is an essential layer if you want to comprehensively protect your networks. http://www.infotech.com/research/select-and-implement-intrusion-detection-and-prevention-systems
	Storyboard: Select and Implement Intrusion Detection and Prevention Systems	Today's threat landscape is more unpredictable than ever. IDPS is an essential layer if you want to comprehensively protect your networks. http://www.infotech.com/research/storyboard-select-and-implement-intrusion-detection-and-prevention-systems
	IDPS Financial Calculator	IDPS can range from being a costly investment to completely manageable depending on your organization. Calculate the TCO and ROI of an implementation with this tool. http://www.infotech.com/research/idps-financial-calculator
	IDPS Appropriateness Assessment Tool	This tool aims to help the enterprise determine whether or not an IDP system is appropriate for the organization. http://www.infotech.com/research/idps-appropriateness-assessment-tool
	IDPS Business Case & Operations Plan	The IDPS Business Case and Operations Plan provides a central document to record information about your IDPS implementation, its ongoing maintenance and incident response strategies. http://www.infotech.com/research/idps-business-case-operations-plan
Vendor Landscape: Email Security Gateway		
	Vendor Landscape: Email Security Gateway	Email security gateway solutions must maintain conventional email security against vast amounts of spam and malware, as well as being equipped to detect spear phishing attacks while enabling easy management and easy reporting. http://www.infotech.com/research/vendor-landscape-email-security-gateway
	Vendor Landscape Storyboard: Email Security Gateway	Email security gateway solutions must maintain conventional email security against vast amounts of spam and malware, as well as being equipped to detect spear phishing attacks while enabling easy management and easy reporting. http://www.infotech.com/research/vendor-landscape-storyboard-email-security-gateway
	Email Security Gateway Vendor Shortlist & Detailed Feature Analysis Tool	This worksheet allows enterprises to profile their email security gateway (ESG) requirements and generate a rank-ordered vendor shortlist from a fixed list of vendors. Vendor profiles are based on Info-Tech's recent in-depth review of the ESG market. http://www.infotech.com/research/email-security-gateway-vendor-shortlist-detailed-feature-analysis-tool
	Email Security Gateway Vendor Demo Script	Allowing vendors to run a product demonstration without your guidance will only highlight their strengths and present a subjective and skewed view of their product offering. http://www.infotech.com/research/email-security-gateway-vendor-demo-script
	Email Security Gateway RFP Template	Issuing an RFP to vendors is a critical step in your email security gateway solution selection process. http://www.infotech.com/research/email-security-gateway-rfp-template

Vendor Landscape: Endpoint Anti-Malware		
	Vendor Landscape Storyboard: Endpoint Anti-Malware	Kaspersky, McAfee, and Sophos lead the pack with well-rounded Endpoint Anti-Malware solutions, but vendor selection isn't just about who the leader is. Competitors provide legitimate alternatives based on the organization's specific functional requirements. http://www.infotech.com/research/storyboard-select-an-enterprise-anti-malware-solution
	Endpoint Anti-Malware Vendor Shortlist Tool	This tool allows enterprises to generate a customized shortlist of Endpoint Anti-Malware vendors based on required capabilities and future requirements for areas such as DLP, application control, and endpoint encryption. http://www.infotech.com/research/it-endpoint-anti-malware-vendor-shortlist-tool
Vendor Landscape: Endpoint Protection		
	Vendor Landscape: Endpoint Protection	Endpoint protection has feature too many standalone options for too long. Vendors are starting to recognize the value of consolidating capabilities. http://www.infotech.com/research/vendor-landscape-endpoint-protection
	Vendor Landscape Storyboard: Endpoint Protection	Endpoint protection has featured too many standalone options for too long. Vendors are starting to recognize the value of consolidating capabilities. http://www.infotech.com/research/vendor-landscape-storyboard-endpoint-protection
	Endpoint Protection Vendor Shortlist & Detailed Feature Analysis Tool	This tool generates a shortlist of endpoint protection software providers based on necessary capabilities and requirements. http://www.infotech.com/research/endpoint-protection-vendor-shortlist-detailed-feature-analysis-tool
	Endpoint Protection Request for Proposal	A Request for Proposal (RFP) is a formal invitation issued by a business or agency requesting interested vendors to submit written proposals meeting a particular set of requirements. http://www.infotech.com/research/endpoint-protection-request-for-proposal
	Endpoint Protection Vendor Demo Script	Use this demonstration script to provide Endpoint Protection solution vendors with a consistent set of instructions, ensuring an objective comparison of product features. http://www.infotech.com/research/endpoint-protection-vendor-demo-script
Vendor Landscape: Intrusion Detection and Prevention Systems		
	Vendor Landscape: Intrusion Detection and Prevention Systems	The threat landscape is more unpredictable than ever, and intrusion detection and prevention products have added the features needed to adapt to this new battlefield. Understanding these new features is key to understanding how you can protect your networks. http://www.infotech.com/research/vendor-landscape-intrusion-detection-and-prevention-systems
	Vendor Landscape Storyboard: Intrusion Detection and Prevention Systems	The threat landscape is more unpredictable than ever, and intrusion detection and prevention products have added the features needed to adapt to this new battlefield. Understanding these new features is key to understanding how you can protect your networks. http://www.infotech.com/research/vendor-landscape-storyboard-intrusion-detection-and-prevention-systems
	IDPS Vendor Shortlist and Detailed Feature Analysis Tool	This tool allows enterprises to generate a customized shortlist of IDPS vendors based on weighted priorities like features, usability, vendor viability and more. Also can create a customized shortlist based on specific advanced features such as virtual infrastructure protection and DoS/DDoS protection. http://www.infotech.com/research/idps-vendor-shortlist-and-detailed-feature-analysis-tool

	Intrusion Detection and Prevention System Vendor Demo Script	This template is designed to provide IDPS vendors with a consistent set of instructions, ensuring an objective comparison of product features - all while evaluating ease-of-use, and ease of set-up and configuration. http://www.infotech.com/research/intrusion-detection-and-prevention-system-vendor-demo-script
	Intrusion Detection and Prevention System RFP Template	Organizations embarking on the selection process for IDPS solutions may elect to issue a Request for Proposal (RFP) after determining their final selection criteria. http://www.infotech.com/research/intrusion-detection-and-prevention-system-rfp-template
Vendor Landscape: Network Access Control		
	Vendor Landscape: Network Access Control	The network access control (NAC) market is reappearing thanks to mobile devices and the BYOD trend. Whether you need NAC for managing guest access, enforcing network policies, or for endpoint compliance, use this vendor landscape to help choose the vendor that best fits your needs. http://www.infotech.com/research/it-vendor-landscape-network-access-control
	Vendor Landscape Storyboard: Network Access Control	The network access control (NAC) market is reappearing thanks to mobile devices and the BYOD trend. Whether you need NAC for managing guest access, enforcing network policies, or for endpoint compliance, use this vendor landscape to help choose the vendor that best fits your needs. http://www.infotech.com/research/it-vendor-landscape-storyboard-network-access-control
	NAC Vendor Shortlist Tool	Each organization will have its own priorities for evaluating and selecting network access control (NAC) vendors and solutions. Use the NAC Vendor Shortlist Tool to generate a customized shortlist of vendors that will best meet business requirements. http://www.infotech.com/research/it-network-access-control-vendor-shortlist-tool
	Network Access Control RFP Template	Use this template to help create a request for proposal (RFP) for a Network Access Control (NAC) solution according to your enterprise requirements. http://www.infotech.com/research/network-access-control-rfp-template
	Network Access Control Vendor Demo Script	This template is designed to provide Network Access Control (NAC) vendors with a consistent set of instructions to ensure an objective comparison of product features - all while evaluating ease of use, ease of set-up, and configuration. http://www.infotech.com/research/network-access-control-vendor-demo-script
Vendor Landscape: Next Generation Firewall		
	Vendor Landscape: Next Generation Firewall	Network security is still a high priority for organizations; the right perimeter means more threats stay outside and sensitive data remains inside. http://www.infotech.com/research/vendor-landscape-next-generation-firewall
	Vendor Landscape Storyboard: Next Generation Firewall	Check Point, Fortinet, Sophos, and Barracuda lead the pack with well-rounded Next Generation Firewall (NGFW) solutions, but vendor selection isn't just about who's the leader. Competitors provide legitimate alternatives based on the organization's specific functional requirements. http://www.infotech.com/research/vendor-landscape-storyboard-next-generation-firewall

	Next Generation Firewall Vendor Shortlist & Detailed Feature Analysis Tool	This tool generates a shortlist of NGFW software providers based on necessary capabilities and requirements. http://www.infotech.com/research/next-generation-firewall-vendor-shortlist-detailed-feature-analysis-tool
	Next Generation Firewall Request for Proposal	A Request for Proposal (RFP) is a formal invitation issued by a business or agency requesting interested vendors to submit written proposals meeting a particular set of requirements. http://www.infotech.com/research/next-generation-firewall-request-for-proposal
	Next Generation Firewall Vendor Demo Script	Use this demonstration script to provide Next Generation Firewall (NGFW) solution vendors with a consistent set of instructions, ensuring an objective comparison of product features. http://www.infotech.com/research/next-generation-firewall-vendor-demo-script
Vendor Landscape: Security Information & Event Management		
	Vendor Landscape: Security Information & Event Management	Security analytics and network monitoring are some of the most effective tactics available to fight against the latest threat landscape. Understand your organization's requirements for a Security Information & Event Management (SIEM) system to ensure the right product selection achieves your key goals. http://www.infotech.com/research/it-vendor-landscape-plus-security-information-event-management
	Vendor Landscape Storyboard: Security Information & Event Management	Two vendors lead the pack with well-rounded Security Information & Event Management (SIEM) solutions, but vendor selection isn't just about the leader. Competitors provide legitimate alternatives based on the organization's specific functional requirements. http://www.infotech.com/research/it-vendor-landscape-plus-storyboard-security-information-event-management
	SIEM Vendor Shortlist and Detailed Analysis Tool	This tool allows enterprises to generate a customized shortlist of Security Information & Event Management (SIEM) vendors based on required capabilities and future requirements for log management, compliance reporting, security incident/event management, and IT risk management. http://www.infotech.com/research/it-security-information-event-management-siem-vendor-shortlist-tool
	SIEM Vendor Demo Script	This template is designed to provide Security Information & Event Management (SIEM) vendors with a consistent set of instructions to ensure an objective comparison of product features - all while evaluating ease of use, ease of set-up, and configuration. http://www.infotech.com/research/it-security-information-event-management-siem-vendor-demo-script
	SIEM RFP Template	Use this template to help create a request for proposal (RFP) for a Security Information & Event Management (SIEM) solution according to your enterprise requirements. http://www.infotech.com/research/it-security-information-event-management-siem-rfp-template
Additional Resources		
	Avoid the Next Heartbleed	This is a brief research note for Info-Tech's members about the Heartbleed bug, i.e. the first security vulnerability with worldwide impact and response. Understand which security initiatives should be taken in order to protect the business and avoid the next Heartbleed. http://www.infotech.com/research/avoid-the-next-heartbleed

	NAC End-User Training Plan	Achieving mutual understanding between IT and end users is vital to the success of a NAC implementation. End users must be made aware of the potential process changes they may encounter with NAC, and how to deal with them. http://www.infotech.com/research/nac-end-user-training-plan
	NAC Communication Plan	Communication is half the battle with NAC implementations. Securing stakeholder buy-in, and making them aware of the changes that can come with NAC can sometimes be a challenge. Gain support by using business language and focusing on costs saved through simplified compliance strategies. http://www.infotech.com/research/nac-communication-plan

Servers and Storage Research

Servers and Storage: Server & Storage Virtualization

Type	Document	Description
Vendor Landscape: Cloud Management		
	Vendor Landscape Storyboard: Cloud Management	Cloud management is a rapidly maturing and evolving market comprised of proprietary and open source vendors coming from varied backgrounds. http://www.infotech.com/research/it-vendor-landscape-storyboard-cloud-management

Servers and Storage: Storage

Type	Document	Description
Blueprint: Two Days to an Annual Storage Strategy		
	Storyboard: Two Days to an Annual Storage Strategy	Walk through the steps necessary to build a robust storage strategy that is not only responsive to present storage concerns but is prepared for your organization's future. http://www.infotech.com/research/it-storyboard-two-days-to-an-annual-storage-strategy

Enterprise Networks Research

Enterprise Networks: Enterprise WANs

Type	Document	Description
	The Changing Face of WAN Optimization	WAN optimization solutions have traditionally come in the form of dedicated appliances deployed in data centers and branch offices. As the technology matures, solutions are evolving from dedicated appliances to software based virtual appliances and router modules. Enterprises considering WAN optimization implementations should evaluate these emerging options. http://www.infotech.com/research/the-changing-face-of-wan-optimization

Strategy & Leadership Research

Architecture Research

Architecture: Application Portfolio Management

Type	Document	Description
	Apps Rationalization Case Study of Olmsted Medical Center	Olmsted Medical Center recruited Info-Tech Research Group to conduct an on-site workshop to kick-start its long-term application rationalization process. During the workshop, Olmsted assessed 13 core applications in terms of their strategic importance to the organization; functional gaps, overlaps, and dependencies; life stage; and TCO. http://www.infotech.com/research/apps-rationalization-case-study-of-olmsted-medical-center

Architecture: Enterprise Architecture

Type	Document	Description
Blueprint: Adopt 10 Universal Enterprise Architecture Principles		
	Adopt 10 Universal Enterprise Architecture Principles	EA principles are shared, long-lasting beliefs that guide the use of IT in constructing, transforming, and operating the enterprise by informing and restricting target-state enterprise architecture design, IT investment portfolio management, solution development, and procurement decisions. http://www.infotech.com/research/adopt-10-universal-enterprise-architecture-principles
	Storyboard: Adopt 10 Universal Enterprise Architecture Principles	EA principles are shared, long-lasting beliefs that guide the use of IT in constructing, transforming, and operating the enterprise by informing and restricting target-state enterprise architecture design, IT investment portfolio management, solution development, and procurement decisions. http://www.infotech.com/research/storyboard-adopt-10-universal-enterprise-architecture-principles
	EA Principles Communication Plan Template	Create a communication plan to promote EA principles enterprise-wide, maintain buy-in and foster conformance. http://www.infotech.com/research/ea-principles-communication-plan-template
	EA Principles Group Charter Template	Write a charter and get it approved by the IT Steering Committee to establish an EA Principles Group. http://www.infotech.com/research/ea-principles-group-charter-template
	EA Principles Operationalization Roadmap Template	Improve your governance processes and policies to support your EA principles. Use Info-Tech's EA Principle Operationalization Plan Template to define next steps. http://www.infotech.com/research/ea-principles-operationalization-roadmap-template
Blueprint: Assess and Optimize EA Capability		
	Assess and Optimize EA Capability	Address the organization's mandate for Enterprise Architecture (EA) by optimizing EA management practices, EA organization and roles, EA staff competency and capacity, and EA tools. http://www.infotech.com/research/assess-and-optimize-ea-capability

Type	Document	Description
	Storyboard: Assess and Optimize EA Capability	Address the organization's mandate for Enterprise Architecture (EA) by optimizing EA management practices, EA organization and roles, EA staff competency and capacity, and EA tools. http://www.infotech.com/research/storyboard-assess-and-optimize-ea-capability
	EA Capability Assessment and Planning Tool	Assess current and plan target EA capability to identify gaps and plan EA capability improvement. http://www.infotech.com/research/ea-capability-assessment-and-planning-tool
	EA Capability Risk and Complexity Assessment Tool	Assess organization risk and complexity to right-size the EA capability optimization effort. http://www.infotech.com/research/ea-capability-risk-and-complexity-assessment-tool
	EA Capability Performance and Value Measurement Plan	Develop an EA capability performance and value measurement plan. http://www.infotech.com/research/ea-capability-performance-and-value-measurement-plan
	EA Staff Competency Management Tool	Determine required skills and proficiency levels for EA roles. http://www.infotech.com/research/ea-staff-competency-management-tool
	Job Description Template	Job descriptions are important management documents that set expectations, accountabilities, and other requirements for job performance. Use this template to document role requirements in detail. http://www.infotech.com/research/job-description-template
	EA Capability Optimization Project Charter Template	Develop an EA Capability Optimization Project Charter and get a formal sign-off authorizing the project execution. http://www.infotech.com/research/ea-capability-optimization-project-charter-template
	EA Vision and Mission Sampler	Write a concise vision statement to articulate the desired state of and set direction for the EA capability. http://www.infotech.com/research/ea-vision-and-mission-sampler
	EA Principles Sampler	Define EA principles to guide target enterprise architecture definition, solution development, acquisition, and operation. http://www.infotech.com/research/ea-principles-sampler
	EA Goals and Objectives Sampler	Define EA capability goals and related measures that resonate with EA capability stakeholders. http://www.infotech.com/research/ea-goals-and-objectives-sampler
	EA Communication Plan Template	Develop an EA Communication Plan to structure the communication aimed at "selling" EA stakeholders on EA. http://www.infotech.com/research/ea-communication-plan-template
	EA Policy Template	Create an EA Policy to establish a basis for governing compliance of in-scope processes to direction set by EA. http://www.infotech.com/research/ea-policy-template
	EA Standard Operating Procedures Template	Develop EA Standard Operating Procedures (SOP) that support EA Policy, vision, and mission. http://www.infotech.com/research/ea-standard-operating-procedures-template
	EA Process Workflow Diagrams	Make EA process flow diagrams a part of your SOP. http://www.infotech.com/research/ea-process-workflow-diagrams
	EA Policies Sampler	Refer to Info-Tech's EA Policies Sampler for a collection of EA policies from various organizations. http://www.infotech.com/research/ea-policies-sampler
	EA Artifacts and Deliverables Definition Sampler	Standardize EA work products to promote consistency across the enterprise. http://www.infotech.com/research/ea-artifacts-and-deliverables-definition-sampler

Type	Document	Description
	EA Capability Improvement Plan Template	Consolidate and refine steps required to roll out the target EA operating model and improve EA capability. http://www.infotech.com/research/ea-capability-improvement-plan-template
Blueprint: Covertly Establish a Business-Centric, Value-Driven EA Capability		
	Covertly Establish a Business-Centric, Value-Driven EA Capability	Establishing an Enterprise Architecture (EA) practice can help organizations enable their strategic business intent and improve effectiveness, efficiency, and agility. http://www.infotech.com/research/it-covertly-establish-a-business-centric-value-driven-ea-capability
	Storyboard: Covertly Establish a Business-Centric, Value-Driven EA Capability	Secure business buy-in and executive support by bypassing prejudice and resistance to Enterprise Architecture (EA) and communicating EA contribution to business value. http://www.infotech.com/research/it-storyboard-covertly-establish-a-business-centric-value-driven-ea-capability
	EA Capability Metric Definition Tool	After interviewing business stakeholders and identifying high priority capabilities and initiatives, record the definitions of the gathered metrics from the Metrics Evaluation Matrix into the Metric Definition Tool. http://www.infotech.com/research/ea-capability-metric-definition-tool
	Value Measure List	During interviews with business stakeholders, while identifying high priority capabilities and initiatives, gather value measures and input them into the Value Measure List. http://www.infotech.com/research/value-measure-list
	Business Capability Evaluation Matrix Template	A business capability is an abstraction that helps describe what the enterprise does to achieve its vision, mission, and goals. A business capability can be further decomposed into business processes, which define how the enterprise does this, in terms of activities performed by people that utilize tools (technology). Business capabilities are the building blocks of the enterprise. http://www.infotech.com/research/it-business-capability-evaluation-matrix-template
	EA Charter Document Template	A charter is one of the most critical communications during an enterprise architecture initiative. All stakeholders must understand and agree on the objectives and important characteristics of the plan before it begins. http://www.infotech.com/research/it-ea-charter-document-template
	EA Marketing Plan Template	A critical step for building strong stakeholder relationships and buy-in for the Enterprise Architecture (EA) initiative is the regular marketing of value statements. These value statements must be supported by relevant selected business metrics, along with any EA stories that contribute toward the stated value. http://www.infotech.com/research/it-ea-marketing-plan-template
	Initiative Evaluation Matrix Template	Enterprise Architecture (EA) can significantly improve performance and likelihood of success of initiatives that are transformational in nature (those that affect the foundational structure of the enterprise). http://www.infotech.com/research/it-initiative-evaluation-matrix-template
	Metrics Evaluation Matrix Template	Gather metrics from three sources (business imperatives, high priority business capabilities, high priority initiatives) and insert them into the Metrics Evaluation Matrix Template to see which metrics should be selected to prove EA's value. http://www.infotech.com/research/it-metrics-evaluation-matrix-template

Type	Document	Description
	RACI Chart Template	A critical step in defining the Enterprise Architecture (EA) operating model is completing a RACI chart (responsible, accountable, consulted, and informed). http://www.infotech.com/research/it-raci-chart-template
	Strategy Alignment Map Template	High priority business capabilities and initiatives (programs, projects) must be aligned with business imperatives. Use the Strategy Alignment Map Template to draw a strategy map visualizing how your high priority capabilities and initiatives support your business imperatives. http://www.infotech.com/research/it-strategy-alignment-map-template
	Stakeholder Analysis Template	Identify and analyze your stakeholders, and develop a strategy to effectively engage them. Use Info-Tech's Stakeholder Analysis Template and treat this artifact as internal and confidential (i.e. do not share it with the stakeholders). http://www.infotech.com/research/stakeholder-analysis-template
Blueprint: Develop an Enterprise Architecture Vision		
	Develop an Enterprise Architecture Vision	Develop a high-level vision of the capabilities and business value to be delivered as a result of achievement of the proposed target state architecture, achieve stakeholder agreement, and obtain approval to execute the associated EA engagement. http://www.infotech.com/research/develop-an-enterprise-architecture-vision
	Storyboard: Develop an Enterprise Architecture Vision	Develop a high-level vision of the target state architecture, achieve stakeholder agreement, and obtain approval and funding to execute the associated enterprise architecture (EA) engagement. http://www.infotech.com/research/storyboard-develop-an-enterprise-architecture-vision
	EA Vision Risk and Complexity Assessment Tool	Use Info-Tech's EA Vision Risk & Complexity Assessment tool to right-size EA Vision development. http://www.infotech.com/research/ea-vision-risk-and-complexity-assessment-tool
	Business Transformation Readiness Assessment Tool	Perform business transformation readiness assessment to gauge the organization's readiness to undergo change. Determine and analyze ratings for twelve readiness factors established by the Business Transformation Enablement Program (BTEP). http://www.infotech.com/research/business-transformation-readiness-assessment-tool
	Stakeholder Analysis Template	Identify and analyze your stakeholders, and develop a strategy to effectively engage them. Use Info-Tech's Stakeholder Analysis Template and treat this artifact as internal and confidential (i.e. do not share it with the stakeholders). http://www.infotech.com/research/stakeholder-analysis-template
	Enterprise Architecture Vision Template	Create an EA Vision document to facilitate stakeholder agreement on scope and direction of EA engagement. At the bare minimum, the EA Vision document must define the high-level vision of target state enterprise architecture and the EA engagement scope. http://www.infotech.com/research/enterprise-architecture-vision-template
	EA Scoping Template	Define the scope of the EA effort in terms of breadth, depth, time period, and coverage of EA domains. Include a concise definition of the EA engagement scope in your Architecture Vision document. http://www.infotech.com/research/ea-scoping-template

Type	Document	Description
	Business Modeling Template	Draw initial draft high-level architectural models of baseline and target architectures. Avoid jumping straight to application/technology architectural models. Start with business modeling, e.g. value chain diagram and business capability map. http://www.infotech.com/research/business-modeling-template
	EA Vision Communication Plan Template	Market and sell your EA Vision to your EA stakeholders. Socialize the EA Vision Document among your EA stakeholders and achieve their buy-in and approval. This may require several iterations to address stakeholder feedback. http://www.infotech.com/research/ea-vision-communication-plan-template
	Statement of Architecture Work Template	Develop a Statement of Architecture Work and secure approval that authorizes the EA engagement. Use Statement of Architecture Work to get funding and secure resources to work on the envisioned EA engagement. http://www.infotech.com/research/statement-of-architecture-work-template

Innovation Research

Innovation: Innovation Management

Type	Document	Description
Blueprint: Adopt New Technologies for 2011 and Beyond		
	Adopt New Technologies for 2011 and Beyond	To maintain parity with competitors and especially to exceed their capabilities, IT must take advantage of the ongoing introduction and evolution of exciting new technologies, while discarding obsolete ones. http://www.infotech.com/research/it-adopt-new-technologies-for-2011-and-beyond
	Storyboard: Adopt New Technologies for 2011 and Beyond	To maintain parity with competitors and exceed their capabilities, IT must take advantage of the ongoing introduction and evolution of new technologies, while discarding obsolete ones. Assess which of Info-Tech's 2011 technology trends the organization should be looking at for 2011 and beyond. http://www.infotech.com/research/it-storyboard-adopt-new-technologies-for-2011-and-beyond
	New Technology Adoption Assessment Tool (2011)	To maintain parity with competitors and exceed their capabilities, IT must take advantage of the ongoing introduction and evolution of new technologies and discard obsolete ones. Assess which of Info-Tech's 2011 technology trends the organization should be looking at for 2011 and beyond. http://www.infotech.com/research/it-new-technology-adoption-assessment-tool-2011
	The Technology Thaw of 2011	Despite continuing economic challenges, IT organizations must continue to innovate. An essential element of innovation is the utilization of new technologies. In 2011, we are witnessing changes to the technology landscape on an unprecedented scale. http://www.infotech.com/research/it-the-technology-thaw-of-2011
	Embrace New Technologies for 2011 and Beyond (Part One)	To maintain parity with competitors and exceed their capabilities, IT must take advantage of the ongoing introduction and evolution of new technologies while discarding obsolete ones. Assess which of Info-Tech's 2011 technology trends the organization should be looking at for 2011 and beyond. http://www.infotech.com/research/it-embrace-new-technologies-for-2011-and-beyond-part-one

Type	Document	Description
▶	Embrace New Technologies for 2011 and Beyond (Part Two)	To maintain parity with competitors and exceed their capabilities, IT must take advantage of the ongoing introduction and evolution of new technologies while discarding obsolete ones. Assess which of Info-Tech's 2011 technology trends the organization should be looking at for 2011 and beyond. http://www.infotech.com/research/it-embrace-new-technologies-for-2011-and-beyond-part-two
▶	Managing IT in Turbulent Times: IT in 2012	2012 promises to be a turbulent year for IT leaders. Users are increasingly active in establishing how they wish to use new technology, with tablets and social media top of mind. There can be significant benefits when organizations move to leverage these new paradigms. However, user demands often push beyond the comfort level of IT. The challenge for IT is to lead these changes, rather than wait for user pressure, or worse, push back on these opportunities. http://www.infotech.com/research/it-managing-it-in-turbulent-times-it-in-2012
Blueprint: Create a Strategic IT Roadmap for Marketing, Sales, and Customer Service that Exploits Emerging Technologies		
	Create a Strategic IT Roadmap for Marketing, Sales, and Customer Service that Exploits Emerging Technologies	The IT value proposition is changing. No longer simply a tool for automating back-office and repetitive processes, CIOs have the opportunity to apply IT to optimize top-line revenue opportunities. By focusing IT strategies on sales, marketing, and customer service, CIOs will improve value contribution of the IT function and raise their individual profiles as business executives. http://www.infotech.com/research/create-a-strategic-it-roadmap-for-marketing-sales-and-customer-service-that-exploits-emerging-technologies
	Storyboard: Create a Strategic IT Roadmap for Marketing, Sales, and Customer Service that Exploits Emerging Technologies	Social, mobile, and analytics technologies are redefining the art of the possible in marketing, sales, and customer service. http://www.infotech.com/research/storyboard-create-a-strategic-it-roadmap-for-marketing-sales-and-customer-service-that-exploits-emerging-technologies
	IT-Enabled Revenue Generation Initiative Prioritization Tool	Shortlist and prioritize selected IT-enabled revenue generation initiatives using Info-Tech's tool. http://www.infotech.com/research/it-enabled-revenue-generation-initiative-prioritization-tool
	Social Styles Analysis Tool	Use Info-Tech's Social Styles Analysis Tool to determine the social styles of your stakeholders and plan to engage them. http://www.infotech.com/research/social-styles-analysis-tool
	IT-Enabled Revenue Generation Program Metric Definition Template	Identify revenue-related business metrics and start tracking your organization's performance against them. http://www.infotech.com/research/it-enabled-revenue-generation-program-metric-definition-template
	Revenue Generation Program Communication Plan Template	Create and execute a communication plan to ensure that the right messages are properly communicated. http://www.infotech.com/research/revenue-generation-program-communication-plan-template
	IT Capability Readiness Check Template	Perform two IT capability readiness checks to ensure IT can support the new revenue-focused initiatives. http://www.infotech.com/research/it-capability-readiness-check-template

Type	Document	Description
	IT-Enabled Revenue Generation Initiative Roadmap Template	Develop a roadmap that sequences and stages your IT-enabled revenue generation initiatives. http://www.infotech.com/research/it-enabled-revenue-generation-initiative-roadmap-template
	Revenue Generation Working Committee Charter Template	Use Info-Tech's charter template to formalize the creation of a Revenue Generation Working Committee Charter and communicate its purpose and responsibilities to the involved stakeholders. http://www.infotech.com/research/revenue-generation-working-committee-charter-template
	Revenue Generation Steering Committee Charter Template	Use Info-Tech's charter template to formalize the creation of a Revenue Generation Steering Committee Charter and communicate its purpose and responsibilities to the involved stakeholders. http://www.infotech.com/research/revenue-generation-steering-committee-charter-template
	Revenue Generation Meeting Agenda Template	Meet with business executives from marketing, sales, and service to discuss how IT can help generate revenue. Your ultimate goal is to win executive support for IT-enabled revenue generation initiatives and strengthen key relationships. http://www.infotech.com/research/revenue-generation-meeting-agenda-template
	Innovation Advisory Group Charter	This Innovation Advisory Group Charter template provides the necessary activities and features of the group. http://www.infotech.com/research/it-innovation-advisory-group-charter
	Institutionalizing Innovation through IT	Leverage IT's strong multi-department spanning position to facilitate innovation across the enterprise. http://www.infotech.com/research/institutionalizing-innovation-through-it-
Blueprint: Prepare IT for Increased Cloud Adoption		
	Prepare IT for Increased Cloud Adoption	Adoption of the cloud has seen incredible growth in the last year, and has passed a tipping point. The impact of adoption will be experienced throughout IT. http://www.infotech.com/research/ss/it-understand-the-cloud-to-make-informed-adoption-decisions
	Storyboard: Prepare IT for Increased Cloud Adoption	The cloud allows IT organizations to be more flexible, scalable and competitive. However, prompt organizational changes in technology, processes and people are required to take full advantage of the value from the cloud. http://www.infotech.com/research/it-storyboard-prepare-it-for-increased-cloud-adoption
	Cloud Change Requirements Assessment Tool	Before taking steps towards moving a significant number of apps to the cloud, the organization needs to assess its current ability to adequately prepare for the upcoming changes and avoid organizational resistance to the changes. http://www.infotech.com/research/cloud-change-requirements-assessment-tool
	Performance Improvement on Cloud Adoption Assessment	After moving a significant number of apps to the cloud, the organization needs to assess its current organizational performance on cloud adoption. Use this tool to determine where changes and focus are needed across six categories by answering a simple questionnaire about key indicators. http://www.infotech.com/research/it-performance-improvement-on-cloud-adoption-assessment

Type	Document	Description
	Cloud Service TCO Comparison Tool	Total Cost of Ownership is an important consideration when choosing a cloud vendor or service, or choosing whether or not to put an app into the cloud. Analysis of TCO can help you decide whether to move forward with a design or go back to the drawing board and justify your proposed project to secure funding. http://www.infotech.com/research/it-cloud-service-tco-comparison-tool
	Cloud Vendor Performance Management Dashboard	Moving significant applications to the cloud brings about increased effort requirements in dealing with multiple vendors. Effective vendor management will maximize the value received from your supplier engagements and hold the vendors accountable for their promises. Organizations can use this dashboard to implement vendor performance management efficiently. http://www.infotech.com/research/it-cloud-vendor-performance-management-dashboard
Additional Resources		
	Innovation Case Study of a Fast-Growing Municipality	A fast-growing municipal region serving a population of over one million sought to move the current organizational culture towards innovation through better-supported idea generation, collaboration, and testing. Info-Tech conducted a one-week Innovation workshop to pinpoint opportunities and develop sustainable innovation growth practices. http://www.infotech.com/research/innovation-case-study-of-a-fast-growing-municipality
	Water Wheels, Cold Fusion & The Cloud	How will cloud computing impact enterprise IT? In answering this question, references to water wheels and modern electric utilities will sometimes come up. This is a useful, though deeply flawed, historical analogy. Don't think hydro turbines. Think cold-fusion reactors. http://www.infotech.com/research/water-wheels-cold-fusion--the-cloud
	Education: Be SMARTer, Train Teachers on Interactive Whiteboards	ICT helps reduce the stress many teachers battle today, however many teachers are hesitant to adopt new technology due to a lack of understanding. Train technology resistant teachers to improve the learning environment and increase morale. http://www.infotech.com/research/education-be-smarter-train-teachers-on-interactive-whiteboards
	Lecture Capture Solutions Speak to Higher Education Needs	Providing students with anywhere, anytime access to recorded course lectures is an opportunity for postsecondary institutions to expand campus reach and promote student achievement. IT departments should be prepared to aid educators in the investigation of lecture capture technologies and solutions. http://www.infotech.com/research/lecture-capture-solutions-speak-to-higher-education-needs

Leadership & People Research

Leadership & People: IT Organizational Design

Type	Document	Description
Blueprint: Transform IT Through Strategic Organizational Design		
	Transform IT Through Strategic Organizational Design	Use Info-Tech's five-step process to help you redesign your IT organizational structure. Info-Tech's client-tested methodology and processes support the enablement of IT/business alignment, decrease decision-making cycle times, and allow focus time and effort to be spent on the capabilities important to the organization. http://www.infotech.com/research/transform-it-through-strategic-organizational-design
	Storyboard: Transform IT Through Strategic Organizational Design	Use Info-Tech's five step process to help redesign your IT organizational design. Our client-tested methodology and processes support IT/business alignment, decrease decision-making cycle times, and allow focus of time and effort on the capabilities important to the organization. http://www.infotech.com/research/storyboard-transform-it-through-strategic-organizational-design
	IT Organizational Design Management Presentation	Use this presentation to obtain formal sign-off on your IT organizational design and initiate the next steps in the process. http://www.infotech.com/research/it-organizational-design-management-presentation
	Comprehensive Competency Library	The IT Competency Library is a resource used to help select required competencies for each position in the new IT organization. http://www.infotech.com/research/comprehensive-competency-library
	Corporate Structure Interview Guide	The Corporate Structure Interview Guide is a resource used to interview key stakeholders to discover IT organizational design needs and requirements. http://www.infotech.com/research/corporate-structure-interview-guide
	IT Organizational Design Capability Assessment	The IT Organizational Design Capability Assessment is used to help prioritize IT capabilities for the new organization structure. http://www.infotech.com/research/it-organizational-design-capability-assessment
	IT Organizational Design Communications Management Plan Template	The Communications Management Plan Template is used to communicate the rationale and process used for the reorganization to key stakeholders. http://www.infotech.com/research/it-organizational-design-communications-management-plan-template
	IT Organizational Design Project Charter Template	The Project Charter Template is used to communicate the value and rationale for an IT organizational design project to key stakeholders. http://www.infotech.com/research/it-organizational-design-project-charter-template
	IT Organizational Design Project Roadmap Tool	The IT Organizational Design Project Roadmap Tool is used to guide your organization through a successful implementation of the new organizational structure. http://www.infotech.com/research/it-organizational-design-project-roadmap-tool
	IT Organizational Design Reference Book	The IT Organizational Design Reference Book is used to document the decisions and steps for the reorganization. http://www.infotech.com/research/it-organizational-design-reference-book

Type	Document	Description
	IT Organizational Design Stakeholder and Communication Planning Template	Use this template to track stakeholders and plan your stakeholder communication throughout the IT organizational design project. http://www.infotech.com/research/it-organizational-design-stakeholder-and-communication-planning-template
Blueprint: Acquire New and Hot IT Skills		
	Acquire New and Hot IT Skills	Info-Tech has identified five trends that promise to transform IT departments within the next two years. Changes in mobility, cloud, big data, social media, and security will alter the way IT functions within the business. http://www.infotech.com/research/it-acquire-new-and-hot-it-skills
	Storyboard: Acquire New and Hot IT Skills	New technologies mean that IT needs new skills. When the new skills aren't available in-house, it's time to start looking outside. http://www.infotech.com/research/it-storyboard-acquire-new-and-hot-it-skills
	Skill Acquisition Impact Assessment Tool	Use this tool to determine the impact of your need for a new skill to help decide the most appropriate acquisition method. http://www.infotech.com/research/it-skill-acquisition-impact-assessment-tool
	IT New Hire Business Case Template	The IT new hire business case will help you to make a more informed hiring decision. http://www.infotech.com/research/it-it-new-hire-business-case-template
Blueprint: Deliver Maximum Value with Limited Staff		
	Deliver Maximum Value with Limited Staff	This solution set will help IT make better decisions as to which initiatives should get priority support. http://www.infotech.com/research/deliver-maximum-value-with-limited-staff
	Storyboard: Deliver Maximum Value with Limited Staff	With increased senior management participation in priority-setting, organizations can reduce the chaos that often results when IT tries to balance limited staff availability with high service demands. This storyboard describes recommended practices that have been proven to improve management's perception of fairness in priority setting. http://www.infotech.com/research/storyboard-deal-more-effectively-with-demand-for-it-staff
	Staff Allocation Tool and Report	In order for demand to be adequately managed, IT leaders have to know what staff is working on. This tool keeps track of what projects and non-project requests staff are assigned to as well as how closely projected, actual, and required staff time align with one another. http://www.infotech.com/research/staff-allocation-tool-and-report
	Assessment Tool for Improving Staff Planning	Without long-term planning, balancing staff availability with demand becomes a nightmare. This tool provides recommendations on changes to be made to existing staff planning processes. http://www.infotech.com/research/assessment-tool-for-improving-staff-planning
	Deal More Effectively with Demand for IT Staff	When IT tries to balance limited staff availability with high service demands, the result is often chaos. Learn about the three approaches that have helped organizations can reduce the chaos that often results proven to improve management's perception of fairness in priority-setting. http://www.infotech.com/research/deal-more-effectively-with-demand-for-it-staff

Blueprint: Develop a Strategic Workforce Plan for IT		
	Develop a Strategic Workforce Plan for IT	IT organizations, regardless of size or maturity level, must plan their ideal staffing levels appropriate to business requirements and projected workloads. Strategic workforce planning identifies skills needed to meet organizational and IT goals, then determines to which roles those skills will belong. http://www.infotech.com/research/it-develop-a-strategic-workforce-plan-for-it
	Storyboard: Develop a Strategic Workforce Plan for IT	Get the right skills at the right time to keep up with shifting technologies. http://www.infotech.com/research/it-storyboard-develop-a-strategic-workforce-plan-for-it
	IT Staffing Requirement and Allocation Assessment	Identify redeployment candidates and plan for IT workforce optimization. http://www.infotech.com/research/it--it-staffing-requirement-and-allocation-assessment
Blueprint: Develop IT Staff Capabilities		
	Develop IT Staff Capabilities	IT organizations, even those not undergoing major changes, must invest wisely in the ongoing training and development of their permanent staff. The training is essential both to improve staff competency in current or proposed areas of responsibility, and to strengthen staff engagement. http://www.infotech.com/research/it-develop-it-staff-capabilities
	Storyboard: Develop IT Staff Capabilities	IT departments that invest in staff training will end up with IT employees who are better able to do their jobs, meet changing business demands, and meet future IT project requirements due to newly acquired skills. http://www.infotech.com/research/it-storyboard-develop-it-staff-capabilities
	IT Training Business Case Template	Training is essential to improving IT staff's current performance, as well as adding new skills for future promotion opportunities. http://www.infotech.com/research/it-it-training-business-case-template
	IT Staffing Requirement and Allocation Assessment	Identify redeployment candidates and plan for IT workforce optimization. http://www.infotech.com/research/it--it-staffing-requirement-and-allocation-assessment
	Employee Termination and Departure Checklist	Terminating staff is a time of high stress for everyone involved. It's easy to make mistakes that open up the enterprise to risk. Don't take any chances. Use this checklist to ensure that an employee's departure is handled legally, ethically and with minimal loss or risk. http://www.infotech.com/research/employee-termination-and-departure-checklist
	IT Staff Downsizing: Targeting Specific Roles in IT	The lean conditions created by the economic downturn will persist for years to come. While cutting IT staff is admittedly unpleasant, at the very least the process should be as objective as possible. http://www.infotech.com/research/it-staff-downsizing-targeting-specific-roles-in-it
	IT New Hire Business Case Template	The IT new hire business case will help you to make a more informed hiring decision. http://www.infotech.com/research/it-it-new-hire-business-case-template
Blueprint: IT Organizational Design		
	IT Organizational Design	Use this research to determine the capabilities needed within the IT organization to align to the business strategy. http://www.infotech.com/research/it-organizational-design

Blueprint: Redeploy IT Staff to Fill Changing Demands		
	Redeploy IT Staff to Fill Changing Demands	Trends in IT put pressure on IT leaders to bring new skills into the IT department. Organizations expect the IT department to adapt to shifting technology without an increase in headcount. http://www.infotech.com/research/it-redeploy-it-staff-to-fill-changing-demands
	Storyboard: Redeploy IT Staff to Fill Changing Demands	Redeployment provides the easiest and most affordable way for IT departments to gain new skills and take on new responsibilities. Locate new areas of demand, select the right employee, retrain, and redeploy. http://www.infotech.com/research/it-storyboard-redeploy-it-staff-to-fill-changing-demands
	Redeployment Decision Tool	Use this tool to assess the redeployability of a shortlist of employees. http://www.infotech.com/research/it-redeployment-decision-tool
	Redeployment Shortlist Template	Record the list of IT employees who can meet departmental needs through redeployment. http://www.infotech.com/research/it-redeployment-shortlist-template
	Redeploy IT Staff	Redeployment provides the easiest and most affordable way for IT departments to gain new skills and take on new responsibilities. Locate skill priorities and assess the value of redeployment. http://www.infotech.com/research/redeploy-it-staff
Additional Resources		
	Demand Management Case Study: Constructive Transition	The transition to a consistent process for prioritizing user requests can last over a year. This case study describes one organization's experience in establishing a more effective process of prioritizing and handling user requests. http://www.infotech.com/research/demand-management-case-study-constructive-transition
	Staff Downsizing Case Study: A Lesson in Layoff Avoidance	When IT cost reductions are required, many organizations avoid cutting staff. Read this Info-Tech case study to learn about the effort it takes to not touch headcount when cutting IT costs in the supply chain management industry. http://www.infotech.com/research/staff-downsizing-case-study-a-lesson-in-layoff-avoidance
	Staff Downsizing Case Study: A Lesson in Unionized IT Shops	Leaders in unionized IT shops have limited options when it comes to making mandated staff reductions. Read this Info-Tech case study to understand the challenges and opportunities in this type of environment. http://www.infotech.com/research/staff-downsizing-case-study-a-lesson-in-unionized-it-shops
	Staff Downsizing Case Study: A Lesson in Preparedness	In staff downsizing, as with most things in life, being prepared is a key to success. Read this case study for a description of how one IT leader created an agile workforce in preparation for a layoff scenario. http://www.infotech.com/research/staff-downsizing-case-study-a-lesson-in-preparedness
	Staff Downsizing Case Study: A Lesson in Retention	Deciding who stays and who goes during downsizing is painful, but at least you get to decide who to keep. Or do you? Read this Info-Tech case study to find out how to prevent key staff from defecting after layoffs. http://www.infotech.com/research/staff-downsizing-case-study-a-lesson-in-retention

	Staff Downsizing Case Study: A Lesson in Moving Quickly	Many IT leaders experienced in staff downsizing say it's best to make cuts both early and deep to avoid prolonging employees' agony. This Info-Tech case study shows how one IT Director started to make mandated staffing cuts his first day on the job. http://www.infotech.com/research/staff-downsizing-case-study-a-lesson-in-moving-quickly
	Agile Offshoring: Making it Work	Organizations offshoring software development have been applying agile methods to facilitate teamwork between onshore and offshore employees. Geographically dispersed teams using agile have proven to be successful; however, they must be managed differently than collocated teams. Plan communication, identify cultural issues, and emphasize teamwork to manage agile offshoring and increase chances of success. http://www.infotech.com/research/agile-offshoring-making-it-work

Leadership & People: Leadership, Culture and Values

Type	Document	Description
Blueprint: Become a More Effective IT Leader		
	Become a More Effective IT Leader	IT leaders have been told by the media, vendors, and analyst community that their role is changing from technology leader to technology strategist, from producer to enabler. http://www.infotech.com/research/apply-leadership-skills-to-maximize-credibility-and-effectiveness
	Storyboard: Become a More Effective IT Leader	IT leaders must focus on strategy and leadership activities, and avoid spending time on most vendor management activities, managing projects, and work their employees could be doing. http://www.infotech.com/research/it-storyboard-become-a-more-effective-it-leader
	IT Leadership Time Benchmarking Tool	The IT Leadership Time Benchmarking Tool allows IT leaders to compare their time allocation to that of the most effective IT leaders and suggests changes to make them more effective. http://www.infotech.com/research/it-it-leadership-time-benchmarking-tool
	How to Become a More Effective IT Leader	IT leaders feel the pressure to spend more time leading and less time on the details. However, with limited budgets, obsolete technologies, a looming shortage of skills, and a rapidly growing backlog of unmet business requirements, it's easy to focus on doing the work instead of managing and leading. The best IT leaders resist this temptation. http://www.infotech.com/research/it-how-to-become-a-more-effective-it-leader
Blueprint: CIO: Build a Personal Development Plan to Become Chief Enterprise Integration Officer		
	CIO: Build a Personal Development Plan to Become Chief Enterprise Integration Officer	As CIO, you must decide NOW what your position in the organization of the future will be. If you don't act, the decision will be made for you. http://www.infotech.com/research/it-cio-build-a-personal-development-plan-to-become-chief-enterprise-integration-officer
	Storyboard: CIO: Build a Personal Development Plan to Become Chief Enterprise Integration Officer	CIOs have to act now and arm themselves with the capabilities needed to be a strategic member of the executive team, or risk being relegated to an operational maintenance role and eventually becoming obsolete. http://www.infotech.com/research/it-storyboard-cio-build-a-personal-development-plan-to-become-chief-enterprise-integration-officer

Type	Document	Description
	Chief Enterprise Integration Officer (CEIO) Capabilities Mapping Tool	This tool should be used by CIOs wishing to assess their current competency levels for the capabilities required to be successful as a CEIO. http://www.infotech.com/research/chief-enterprise-integration-officer-ceio-capabilities-mapping-tool-
	Chief Enterprise Integration Officer	The role of the CEIO is to provide vision and insight into the business strategy, to demonstrate leadership, and to ensure trans-enterprise integration of business processes, technology solutions, etc. to drive competitive capability, innovation, and new revenue. http://www.infotech.com/research/it-chief-enterprise-integration-officer
	CEIO Stakeholder Power Map Template	The stakeholder power map helps to visualize the importance of various stakeholders and your relationship with them so you can prioritize your time according to the most powerful and most "needed" stakeholders. http://www.infotech.com/research/it-ceio-stakeholder-power-map-template
	CEIO Stakeholder Management Strategy Template	The purpose of the CEIO Stakeholder Management Strategy Template is to document stakeholder information, determine stakeholder management actions required, and track actions. http://www.infotech.com/research/it-ceio-stakeholder-management-strategy-template
	Personal Development Plan	The Personal Development Plan is used to map specific activities and time frames towards competency development, with the goal of addressing competency gaps and moving your role forward. http://www.infotech.com/research/it-personal-development-plan
	CEIO Capabilities Scorecard Template	The CEIO Capabilities Scorecard is a strategic planning and management systems used to alight business activities to the strategy of the organization by monitoring performance against strategic goals. http://www.infotech.com/research/ceio-capabilities-scorecard-template
Blueprint: Discover the Hidden Costs of Outsourcing		
	Discover the Hidden Costs of Outsourcing	Business and IT leaders have come under increasing pressure to cut costs, in part due to hype surrounding the cost-cutting potential of outsourcing. http://www.infotech.com/research/it-discover-the-hidden-costs-of-outsourcing
	Storyboard: Discover the Hidden Costs of Outsourcing	Measure, avoid, and mitigate the hidden costs of outsourcing. http://www.infotech.com/research/it-storyboard-discover-the-hidden-costs-of-outsourcing
	Outsourcing Hidden Costs Estimator Tool	Use this tool to predict the magnitude of hidden costs for your outsourcing project. http://www.infotech.com/research/it-outsourcing-hidden-costs-estimator-tool
Blueprint: Leverage Staff Feedback to Improve Management Performance		
	Leverage Staff Feedback to Improve Management Performance	Using IT staff feedback is not just a prudent method for gathering insights about the organization and possibilities for improvement; it can also be a powerful method for increasing staff engagement and confidence in management ability. http://www.infotech.com/research/it-leverage-staff-feedback-to-improve-management-performance

Type	Document	Description
	Storyboard: Leverage Staff Feedback to Improve Management Performance	Collecting feedback from IT staff is essential for improving management performance. Management needs to begin by identifying their own views on the strengths and weaknesses of the IT organization. Next, feedback must be collected through a variety of methods (e.g. interviews, surveys). Finally, improvements need to be identified, prioritized and implemented. http://www.infotech.com/research/it-storyboard-leverage-staff-feedback-to-improve-management-performance
	IT Staff Feedback Assessment Tool	Using staff feedback is critical for improving management of the IT organization. Use this tool to examine your current methods for gathering and analyzing feedback, and receive suggestions for improving the feedback process. http://www.infotech.com/research/it-it-staff-feedback-assessment-tool
	Leverage IT Staff Feedback	Good people management drives high motivation and engagement of IT staff, and it encourages staff development, and is essential for retaining good performers. Start leveraging IT staff feedback, and improve management performance. http://www.infotech.com/research/it-leverage-it-staff-feedback
Blueprint: Create a 100 Day Action Plan to Drive IT Excellence		
	Create a 100 Day Action Plan to Drive IT Excellence	Figure out what you need to do and how you need to do it to improve the level of perceived value you are delivering to the organization. http://www.infotech.com/research/create-a-100-day-action-plan-to-drive-it-excellence
Blueprint: IT Leadership: Seize the First One Hundred Days		
	IT Leadership: Seize the First One Hundred Days	New IT leaders are often met with political and skills-based challenges for which they aren't prepared. http://www.infotech.com/research/it-leadership-seize-the-first-one-hundred-days
Additional Resources		
	Select the Best Coach for CIO Management Development	IT executive skill development within organizations is an important part of career development. Look at hiring an external management consultant, an executive coach, to help continue capabilities growth. However, not all coaches are created equal, so selecting the right coach can be as tricky as hiring a new key employee. Take sufficient time, and the necessary steps, to make the proper choice. http://www.infotech.com/research/select-the-best-coach-for-cio-management-development
	Learning Management Systems Ease Government Agency Training Burden	Implementing a Learning Management System (LMS) to centralize employee training and skills management can dramatically improve organizational performance by shortening training times and facilitating optimal allocations of specific skill sets. IT stands to benefit considerably from an organizational LMS and should lead this initiative by piloting a system for IT skills management. http://www.infotech.com/research/learning-management-systems-ease-government-agency-training-burden

Leadership & People: Manage Human Resources

Type	Document	Description
	Annual Performance Review: Management by Objectives	Regular and formal performance reviews are critical to maintaining overall productivity of your staff. Every organization has a unique method of administering performance appraisals, but many are based on a few simple templates. A commonly used and effective method of performance appraisals is Managing by Objectives. http://www.infotech.com/research/annual-performance-review-management-by-objectives
	Annual Performance Review: Staff	Regular and formal performance reviews are critical to maintaining and improving overall productivity of your staff. Every organization has a unique method of administering performance appraisals, but many are based on a few simple templates. http://www.infotech.com/research/annual-performance-review-staff
	Annual Performance Review: Management	Regular and formal performance reviews are critical to maintaining overall productivity and improvement of managers. Every organization has a unique method of administering performance appraisals, but many are based on a few simple templates. http://www.infotech.com/research/annual-performance-review-management
Blueprint: Develop a Solid Understanding of Performance Appraisal		
	Develop a Solid Understanding of Performance Appraisal	The performance appraisal space is a mess of opinions, formats, methods, and techniques, making it difficult to decide on the performance appraisal approach that is best suited to your organization. http://www.infotech.com/research/develop-a-solid-understanding-of-performance-appraisal
Blueprint: Downsize IT Staff for Future Gain with Minimal Pain		
	Downsize IT Staff for Future Gain with Minimal Pain	Staffing costs comprise the biggest piece of the IT budget. To really cut costs, staff must be a target, but cutting staff is painful and hard to do objectively. http://www.infotech.com/research/downsize-it-staff-for-future-gain-with-minimal-pain
	Succession Management Matrix	If you don't have a strategy for replacing those "irreplaceable" people in your IT department, you could be setting yourself up for disaster. A succession management strategy can avoid a skills crisis. http://www.infotech.com/research/succession-management-matrix
	Help Desk Staff Performance Measurement Tool	Consistent performance reviews of IT help desk staff have two way implications - they help IT managers deliver appropriate guidance to staff, and assist help desk staff understand what is expected from them. This downloadable tool allows IT managers to assess their help desk staff's performance on a regular basis. http://www.infotech.com/research/help-desk-staff-performance-measurement-tool
	Reducing Cost-to-Serve: Internal IT Admin Services	Focusing cost-reduction efforts on internal IT administration services provides quick cost savings. However, it is important to supplement short-term tactics with mid and long-term follow-ups. The techniques provided in this , as well as the potential pitfalls and case studies, allow IT decision makers to align the need to reduce costs with the need to meet business requirements. http://www.infotech.com/research/reducing-cost-to-serve-internal-it-admin-services

Type	Document	Description
	Project Manager Maturity Tool	Mature IT project managers positively influence the overall performance of IT projects. However, IT project management in most organizations still has a long way to go before reaching the top of the maturity ladder. Use this customized tool to assess project manager maturity and take focused steps to improve performance and project success rates. http://www.infotech.com/research/project-manager-maturity-tool
	Span of Control Tool	Establishing an effective manager-to-employee ratio depends on a variety of skill, process, and organizational factors. Apply this tool to aid in determining if the IT department's span of control needs to be broader or narrower than the traditional norm. http://www.infotech.com/research/span-of-control-tool
	Staffing Comparison Options Tool	The complexity and size of IT projects lead IT departments to explore multiple options when determining how to staff a project team. However, they struggle when deciding whether to bring in a contract worker or a full-time employee. Use this tool to make smart staffing choices. http://www.infotech.com/research/staffing-comparison-options-tool
	IT Skills Inventory and Needs Assessment Tool	Reducing headcount is a mentally and emotionally challenging task under any circumstance. Use this tool to take a systematic, skills-focused approach to making staff reduction decisions. http://www.infotech.com/research/it-skills-inventory-and-needs-assessment-tool
	Staff Cuts: Be Objective and Focus on Required Skills	Making staff reductions is not only an emotionally challenging task, but also one wrought with uncertainty and risk for error. This risk is magnified when time frames for reductions are short. Follow a structured and objective method for determining who needs to be cut to minimize mistakes and help the enterprise reduce costs. http://www.infotech.com/research/staff-cuts-be-objective-and-focus-on-required-skills
	Confidentiality and Non-Disclosure Agreement	Non-disclosure agreements (also known as confidentiality agreements) prohibit the communication of certain non-public business information by individuals. Use this template to provide a structure for documenting a confidentiality and non-disclosure agreement with an employee or contractor. http://www.infotech.com/research/confidentiality-and-non-disclosure-agreement
	Interview Process Guide: Behavioral Questions	Conducting a successful behavioral interview requires careful planning and a process. IT managers who fail to properly prepare risk hiring the wrong person or driving away a worthwhile candidate. The behavioral interview is the culmination of the recruiting process, so ensure this integral part is completed successfully. http://www.infotech.com/research/interview-process-guide-behavioral-questions
	Telework Policy and Agreement	Teleworking can increase employee productivity and reduce costs for an enterprise. Use Info Tech's Telework Policy and Agreement as a starting point for your enterprise's telecommuting policy. http://www.infotech.com/research/telework-policy-and-agreement
	Consultant Evaluation Matrix	Apply Info-Tech's consultant evaluation matrix to help you hire the perfect consultant. http://www.infotech.com/research/consultant-evaluation-matrix

Additional Resources		
	Retail Metrics: Development and Help Desk Present Challenges and Opportunities	Retailers are different than their peers. They allocate more resources to development initiatives at the expense of security and help desk operations. This pattern presents a number of critical challenges to successful IT operations. http://www.infotech.com/research/retail-metrics-development-and-help-desk-present-challenges-and-opportunities
	Lay the Foundation for an Agile Workforce	Small IT shops often have lean staff headcounts, affording little flexibility at the best of times. When economic challenges hit, the effects on IT responsiveness can be near-paralytic. Begin to lay a foundation for an agile workforce going forward to maximize already limited flexibility. http://www.infotech.com/research/lay-the-foundation-for-an-agile-workforce

Leadership & People: People Management

Type	Document	Description
Blueprint: Maximize Your Return on Human Capital		
	Maximize Your Return on Human Capital	CIOs must navigate a plethora of human resource issues unique to an IT department. This new Guided Implementation Blueprint will direct CIOs to the key people management issues prevalent in their department and provide them with step-by-step instructions for developing and implementing an HR solution roadmap. At the conclusion of the project CIOs will have a list of initiatives to improve employee engagement, a plan to improve employee development, and a strategy to improve leadership and coaching. http://www.infotech.com/research/maximize-your-return-on-human-capital

Leadership & Performance Management Research

Leadership & Performance Management: Demand & Resources Planning

Type	Document	Description
	Warehouse Voice Technology Now Realistically Priced	Voice-directed warehouse technology is now affordable and increasingly common in the manufacturing industry. Evaluate the potential advantages and risks to determine if a voice-driven system can benefit the enterprise. http://www.infotech.com/research/warehouse-voice-technology-now-realistically-priced

Leadership & Performance Management: IT Training

Type	Document	Description
	Open Source: A Wholly Viable Option for Education	A recent Info-Tech study found that, in the face of budget belt-tightening, educational organizations are successful in reducing licensing and support costs using open source software. However, while open source can be a good choice, it won't fit in every case. Learn about the strengths and pitfalls of open source software for K-12, university, and library settings. http://www.infotech.com/research/open-source-a-wholly-viable-option-for-education

Leadership & Performance Management: Knowledge, Intelligence & Behavior Management

Type	Document	Description
	Basic Skills Assessment Template	Use this basic skills assessment to get upfront knowledge of new users' skills before you offer orientation, training, and support. http://www.infotech.com/research/basic-skills-assessment-template

Leadership & Performance Management: Organizational Design

Type	Document	Description
Blueprint: Downsize IT Staff for Future Gain with Minimal Pain		
	Storyboard: Downsize IT Staff for Future Gain with Minimal Pain	While cutting IT staff is admittedly unpleasant, it is very possible to minimize the pain of downsizing while maximizing the efficiency of your reorganized IT department. Use this storyboard to help you understand downsizing factors, apply short-term and long-term staff cutting tactics, and thrive in the post-downsizing environment. http://www.infotech.com/research/storyboard-downsize-it-staff-for-future-gain-with-minimal-pain

Service Delivery & Management Research

Service Delivery & Management: Infrastructure Delivery & Management

Type	Document	Description
	E-Mail TCO Worksheet	The "E-Mail TCO Worksheet" helps IT leaders peer into existing e-mail infrastructure and provisioning costs. IT leaders will gather expense information for 19 specific cost components in four categories: 1. Security 2. Delivery 3. Availability 4. Maintenance. IT leaders will then gather cost information for other alternatives, such as e-mail hosting. The worksheet provides space to compare these costs side-by-side. http://www.infotech.com/research/e-mail-tco-worksheet
Additional Resources		
	BI in Manufacturing: Drivers, Benefits, and Challenges	Info-Tech data and client interviews reveal that BI success in manufacturing is determined by improvements in decision making and information access. BI challenges include data quality and people issues. Manufacturers embarking on BI initiatives can learn from their peers who have already marked the trail. http://www.infotech.com/research/bi-in-manufacturing-drivers-benefits-and-challenges
	Mobile Phone Payments Making Progress	After a few years of anticipation, it seems as though the ability to make payments using a mobile phone is finally starting to make inroads in North America. Don't expect the infrastructure to be put in place overnight. Pilot programs are being rolled out now and retailers should familiarize themselves with the technology today. http://www.infotech.com/research/mobile-phone-payments-making-progress

	Healthcare Providers: Take a Daily Dose of Telemedicine	Telemedicine has the potential to fill expertise gaps and create potential sources of new revenue. Present telemedicine as an option to your healthcare organization's management team to reap the benefits already enjoyed by so many other healthcare providers. http://www.infotech.com/research/healthcare-providers-take-a-daily-dose-of-telemedicine

Service Delivery & Management: Outsourcing

Type	Document	Description
	Health Care: Plan for Spike in Transcription Demand	As the electronic medical record movement picks up steam, the demand for medical transcription is reaching new heights. Ensure the organization is prepared to meet the growing need by following this four-step plan. http://www.infotech.com/research/health-care-plan-for-spike-in-transcription-demand

Strategy & Governance Research

Strategy & Governance: Compliance

Type	Document	Description
Blueprint: Establish an Effective System of Internal IT Controls to Mitigate Risks		
	Establish an Effective System of Internal IT Controls to Mitigate Risks	An effective system of internal IT controls helps the IT department operate as intended by mitigating risks and ensuring that the organization is in compliance with applicable laws and regulations. It also helps to ensure confidentiality and integrity of the most important asset data. Follow Info-Tech's process to establish a system of controls that optimizes coverage of risks and effectiveness of controls, and continuously identifies and adapts to new risks. http://www.infotech.com/research/establish-an-effective-system-of-internal-it-controls-to-mitigate-risks
	Storyboard: Establish an Effective System of Internal IT Controls to Mitigate Risks	This Blueprint will help you establish a well-designed system of internal controls that helps the IT department operate as intended by mitigating its greatest risks. http://www.infotech.com/research/storyboard-establish-an-effective-system-of-internal-it-controls-to-mitigate-risks
	Audit Log Review Policy	The aim of this policy is to ensure that processes are in place across all designated systems to ensure that designated audit logs are reviewed daily and following a security incident. http://www.infotech.com/research/audit-log-review-policy
	Internal Controls Communication Plan Template	Internal controls are only as effective as their level of adoption. Use this template to ensure that users are aware and compliant with internal controls. http://www.infotech.com/research/internal-controls-communication-plan-template
	Internal Controls Effectiveness Scorecard	The only way to know if your controls are providing adequate coverage is to measure them over time. This tool will give you insight into the continued relevance of your internal controls. http://www.infotech.com/research/internal-controls-effectiveness-scorecard

Type	Document	Description
	Internal Controls Monitoring RACI Template	Responsibilities for governance of the internal controls system should be integrated into the risk management and overall governance function of the IT organization. Use this template to assign roles and responsibilities to the governance function of your internal control system. http://www.infotech.com/research/internal-controls-monitoring-raci-template
	Internal Controls Prioritization Tool	This tool will give you an assessment of your current control coverage and help you determine the types of controls required to mitigate your risks. http://www.infotech.com/research/internal-controls-prioritization-tool
	Internal Controls Self-Assessment Checklist	Self-assessments of the system of internal control should be aligned with the risk assessment process and completed at least annually or upon any major change to the business. Use Info-Tech's Self-Assessment Checklist as a starting point to conduct your assessment. http://www.infotech.com/research/internal-controls-self-assessment-checklist
Blueprint: Survive an Impending Audit		
	Survive an Impending Audit	A failed audit can result in punitive fines and injunctions that disrupt continuing operations until violations are resolved. These highly visible failures are best prevented through auditor-enterprise collaboration and pragmatic audit management. http://www.infotech.com/research/survive-an-impending-audit
	Storyboard: Survive an Impending Audit	This blueprint walks a CIO through an audit to minimize risk, mitigate findings, and maximize auditor value. http://www.infotech.com/research/storyboard-survive-an-impending-audit
	Audit Guide	The audit guide will prepare everyone in the IT organization for their role in the audit and ensure that IT staff and management understand the audit scope, objectives, and proper audit conduct. http://www.infotech.com/research/audit-guide
	Audit Launch Email Template	This template is used to assist the audit launch process. http://www.infotech.com/research/audit-launch-email-template
	Audit Preparation Presentation Template	This template is used to prepare staff and management for the next audit by displaying audit roles and conduct guidelines. http://www.infotech.com/research/audit-preparation-presentation-template
	Audit Scoping Email Template	This template is used to assist with audit scoping. http://www.infotech.com/research/audit-scoping-email-template
Blueprint: Take Control of Compliance Improvement to Conquer Every Audit		
	Take Control of Compliance Improvement to Conquer Every Audit	Compliance improvement and optimization is generally initiated in response to new or changed compliance requirements, a mandate from the business, or an impending audit. This reactive approach to compliance improvement is not only disruptive to business and IT operations but is also less effective than a proactive program. http://www.infotech.com/research/take-control-of-compliance-improvement-to-conquer-every-audit
	Storyboard: Take Control of Compliance Improvement to Conquer Every Audit	This blueprint walks a CIO through the compliance cycle in an effort to improve compliance, reduce compliance costs, and bring value to the business through targeted non-compliance remediation. http://www.infotech.com/research/storyboard-take-control-of-compliance-improvement-to-conquer-every-audit

Type	Document	Description
	Compliance Communication Plan Template	This template is used to structure communication related to compliance changes such as new policies, changes to operating procedures, and remedial measures due to non-compliance. http://www.infotech.com/research/compliance-communication-plan-template
	Compliance Plan Template	This template is used to consolidate the compliance management initiative for the purpose of tracking and monitoring progress and ensuring accountability. http://www.infotech.com/research/compliance-plan-template
	Document Management Template	This template is used to manage documentation attributes for better tracking, it also contains a checklist to ensure documents can be properly tracked and easily located in the future. http://www.infotech.com/research/document-management-template
	External Compliance Interview Guide	This template is used to conduct stakeholder interviews for the purpose of confirming compliance. http://www.infotech.com/research/external-compliance-interview-guide

Strategy & Governance: Governance Framework

Type	Document	Description
Blueprint: Build an Applications Roadmap		
	Build an Applications Roadmap	In order to avoid constant firefighting, the CIO must have a strategic plan in place. By developing and building an applications roadmap, IT can plan out a strategy and proactively implement the actions that will allow IT to reach its core objectives. http://www.infotech.com/research/it-build-an-applications-roadmap
	Storyboard: Build an Applications Roadmap	In order to avoid constant firefighting, the CIO must have a strategic plan in place. By developing and building an applications roadmap, IT can plan out a strategy and proactively implement the actions that will allow IT to reach its core objectives. http://www.infotech.com/research/it-storyboard-build-an-applications-roadmap
	Applications Roadmap Tool	Use this Applications Roadmap Tool to automatically build a roadmap that will allow the organization to leverage apps management resources more efficiently. http://www.infotech.com/research/it-applications-roadmap-tool
Blueprint: Choose a Consumerization Strategy		
	Choose a Consumerization Strategy	Pressure to bring consumer devices and applications into the organization has mounted in recent years. Users (some of whom are business executives) continue to bring devices and apps into the workplace despite limited organizational readiness. http://www.infotech.com/research/it-choose-a-consumerization-strategy
	Storyboard: Choose a Consumerization Strategy	Consumerization is not an option. You must allow consumer devices and unmanaged applications into your organization. Use this timely research to help you find the right path for the enterprise. http://www.infotech.com/research/it-storyboard-choose-a-consumerization-strategy

Type	Document	Description
	Consumerization Strategy Roadmap Tool	Use this tool to find the best roadmap to your consumerization strategy. It will then provide the optimal roadmap to consumerization success, with detailed steps to follow that path. http://www.infotech.com/research/it-consumerization-strategy-roadmap-tool
	Choose Your Consumerization Strategy	Demand for consumer technology in the workplace makes it almost impossible for IT leaders to resist the trend. Instead, the CIO needs to think about his or her options for adopting consumer tech into the workplace. http://www.infotech.com/research/it-choose-your-consumerization-strategy
Blueprint: Manage the Application Lifecycle		
	Manage the Application Lifecycle	Applications pass through four lifecycle stages: Birth, Growth, Maturity, and Death. To effectively manage each application, the IT leader and Applications Manager (AM) must know to which state it belongs. http://www.infotech.com/research/it-manage-the-application-lifecycle
	Storyboard: Manage the Application Lifecycle	Applications pass through four lifecycle stages: Birth, Growth, Maturity, and Death. To effectively manage each application, the IT leader and Applications Manager (AM) must know to which state it belongs. http://www.infotech.com/research/it-storyboard-manage-the-application-lifecycle
	Case Study: ETSA Utilities	Ad hoc management of the application lifecycle leads to inefficient management of the application, reducing its overall value. http://www.infotech.com/research/it-case-study-etsa-utilities
Blueprint: Plan for Application Consolidation		
	Plan for Application Consolidation	Many consolidation projects are poorly planned, costly, and time consuming. They result in angry executives, unhappy users, and IT in the hot seat. http://www.infotech.com/research/it-increase-standardization-consolidation-to-reduce-business-disruption
	Storyboard: Plan for Application Consolidation	Many organizations initiate application consolidation projects with an ambitious outlook, only to have them abort or fail because they didn't assess the feasibility of consolidating the particular applications. http://www.infotech.com/research/it-storyboard-plan-for-application-consolidation
	Software Consolidation Readiness Assessment	The Software Consolidation Readiness Assessment will help IT organizations perform a corporate environmental scan to determine if they can successfully launch and complete a software consolidation project. http://www.infotech.com/research/it-software-consolidation-readiness-assessment
	Applications Review Work Plan Costing Tool	The Applications Review Work Plan Costing Tool allows IT leaders to forecast in detail the staffing and resource costing logistics for the application review project team prior to a consolidation initiative. http://www.infotech.com/research/it-applications-review-work-plan-costing-tool
	Application Inventory Assessment Tool	Assessing the application inventory and evaluating consolidation candidates are critical tasks in preparing for a software consolidation project. The Application Inventory Assessment Tool offers IT leaders a simple, practical method for categorizing, prioritizing, and selecting software consolidation candidates for the organization. http://www.infotech.com/research/it-application-inventory-assessment-tool

Type	Document	Description
	Applications Review Project Charter	Reviewing the application portfolio and evaluating options for consolidation is a comprehensive and detailed process involving various stakeholders and complex procedures. Initial planning for the project is critical to its success. http://www.infotech.com/research/it-applications-review-project-charter
	Flowchart SOP Template (IT)	Standard Operating Procedures (SOPs) are integral to effectively managing IT processes. Flowchart SOPs (Standard Operating Procedures) are best suited to procedures that involve a higher level of detail and describe complex tasks that require a lot of decision making that could alter the order of the required steps. Check out this template to see an example of how flowchart SOPs work to describe writing SOPs. http://www.infotech.com/research/flowchart-sop-template
	Downtime Policy	This downtime policy template will help create a baseline for what is considered acceptable or planned downtime of systems and applications. Most assets do not require five-nines or six-nines availability, so a written policy should help determine their relative value. http://www.infotech.com/research/downtime-policy
	Hierarchical SOP Template	Standard Operating Procedures (SOPs) are integral to effectively managing IT processes. Utilize this template to help write a hierarchical-style SOP (Standard Operating Procedure) which outlines the procedure for writing enterprise-specific SOPs. Hierarchical SOPs involve a higher level of detail and are best suited to more complex tasks that don't require a lot of decision making. http://www.infotech.com/research/hierarchical-sop-template
	Agile Enterprise Architecture: An On-Going Debate	Considerable energy has gone into showing that Enterprise Architecture (EA) and the Agile philosophy can coexist. AgileEA.com, for example, provides a variety of resources to help organizations implement EA and Agile at the same time. http://www.infotech.com/research/it-agile-enterprise-architecture-an-on-going-debate
Blueprint: Turn Power Users into Technology Champions		
	Turn Power Users into Technology Champions	IT must shift their perception of tech-savvy business users from threat to asset, and learn how to systematically identify the ideal power users (technology champions) who can help increase IT's organizational reach. http://www.infotech.com/research/it-turn-power-users-into-technology-champions
	Storyboard: Turn Power Users into Technology Champions	IT must shift their perception of tech-savvy business users with personal applications and devices from threat to asset, and learn how to systematically identify the ideal power users (technology champions) who can help increase IT's organizational reach. http://www.infotech.com/research/it-storyboard-turn-power-users-into-technology-champions
	Technology Champion Evaluation	This tool allows organizations to assess business end users to find technology champions. http://www.infotech.com/research/technology-champion-evaluation
	Turn Power Users into Technology Champions Video	IT must shift their perception of tech-savvy business users with personal applications and devices from threat to asset, and learn how to systematically identify the ideal power users (technology champions) who can help increase IT's organizational reach. http://www.infotech.com/research/it-turn-power-users-into-technology-champions-video

Type	Document	Description
Additional Resources		
	Case Study: Alberta Finance and Enterprise	Alberta Finance and Enterprise takes an open strategy to consumerization to improve worker satisfaction, but not at the cost of its data security. http://www.infotech.com/research/it-case-study-alberta-finance-and-enterprise
	Planning a Takeover? Integrate Systems Post Haste!	When two enterprises merge through acquisition, all efforts must be taken to preserve the business value of the enterprise that was taken over. Moving through the integration of the systems infrastructures in a speedy manner will minimize any disruption to the acquired company's employees, clients, data, and ultimately value. http://www.infotech.com/research/planning-a-takeover-integrate-systems-post-haste

Strategy & Governance: IT Governance

Type	Document	Description
Blueprint: Avoid Project Management Pitfalls		
	Avoid Project Management Pitfalls	To achieve greater likelihood that your project will stay on track, watch out for the four big pitfalls: Scope Creep, Failure to Obtain Stakeholder Commitment, Inability to Assemble a Team, and Failure to Plan. http://www.infotech.com/research/it-avoid-project-management-pitfalls
	Storyboard: Avoid Project Management Pitfalls	Fewer than 15% of projects deliver all requirements, on-time and on-budget. Avoid four common project pitfalls to greatly increase your chances of project success. http://www.infotech.com/research/it-storyboard-avoid-project-management-pitfalls
	Project Pitfall Detection & Mitigation Tool	Use this tool to assess project vulnerability related to four critical challenges that sink many projects. Based on your answers, the tool will indicate which pitfalls threaten your project and what you should do about it. http://www.infotech.com/research/project-pitfall-detection--mitigation-tool
	Project Management Pitfalls Issue Log	Use this tool to track on-going project issues relative to four typical project management pitfalls. As problems arise, related to these pitfalls, track who will handle the problem and when. http://www.infotech.com/research/it-project-management-pitfalls-issue-log
	Avoiding Project Management Pitfalls	Use our strategies to avoid, detect, and mitigate four critical project management pitfalls to help keep your project on track. http://www.infotech.com/research/it-avoiding-project-management-pitfalls
	Project Planning and Monitoring Tool	The beginning stages of the project are dedicated to working out the details of the project task schedule. Take advantage of this tool to determine and create a detailed project plan outlining how the project will progress. http://www.infotech.com/research/project-planning-and-monitoring-tool
Blueprint: Focus on Project Management Essentials		
	Focus on Project Management Essentials	Satisfaction with IT project outcomes is very low. Effective project management is critical yet organizations resist it. http://www.infotech.com/research/project-management-essentials

Type	Document	Description
	Storyboard: Focus on Project Management Essentials	Successful project completion is on everyone's wish list. Understand the four essentials of successful project management and adopt simple tools that will help organize the planning and management of projects without requiring major overhead. http://www.infotech.com/research/storyboard-project-management-essentials
	Project Planning and Monitoring Tool	The beginning stages of the project are dedicated to working out the details of the project task schedule. Take advantage of this tool to determine and create a detailed project plan outlining how the project will progress. http://www.infotech.com/research/project-planning-and-monitoring-tool
	Project Kick-off Meeting Agenda Template	The project kick-off meeting is an essential step of successful project management. It should be conducted at the start of the project execution or phase initiation. Project team roles and responsibilities should be defined, work should be identified, and team rules and processes should also be outlined. http://www.infotech.com/research/project-kick-off-meeting-agenda-template
	Project Team Meeting Agenda Template	Keeping the team informed is critical to project health. Project teams should participate in regular meetings to communicate project status, identify issues, and track performance. Use a meeting agenda during these gatherings to ensure the project is on track. http://www.infotech.com/research/project-team-meeting-agenda-template
	Project Pitfall Detection & Mitigation Tool	Use this tool to assess project vulnerability related to four critical challenges that sink many projects. Based on your answers, the tool will indicate which pitfalls threaten your project and what you should do about it. http://www.infotech.com/research/project-pitfall-detection--mitigation-tool
	EMR Document Imaging Worksheet	Healthcare organizations looking to implement Electronic Medical Records (EMR) technologies should begin with document imaging. Organize a high level strategy for deployment to help build buy-in from senior management. http://www.infotech.com/research/emr-document-imaging-worksheet
	Project Plan Template	Apply this project plan template to help you draft the scope, purpose, individual responsibilities, deliverables, and timeline of a given project. http://www.infotech.com/research/project-plan-template
	Statement of Work	IT projects often fail because the parties involved don't fully understand what work needs to be done, or how success will be measured. To mitigate this risk, use this Statement of Work template. http://www.infotech.com/research/statement-of-work
	Stakeholder Needs Analysis Matrix	A needs analysis allows a project manager to better understand the audience, their stakes in the project, communication barriers, motivations, and hidden agendas. Use this downloadable tool to help identify and document stakeholder needs. http://www.infotech.com/research/stakeholder-needs-analysis-matrix
	IT Project Charter Template	The worst nightmare of any project manager is scope creep. Resolve scope creep and other issues at the outset with a project charter document. http://www.infotech.com/research/it-project-charter-charter-creation-workbook

Type	Document	Description
▶	Quality IT Communication with Stakeholders is Key to Success	It is essential for all CIOs to maintain quality communication with core business stakeholders in order to build strong relationships and establish trust. Consistent discussion with the senior business leaders and executive decision makers help to pave the way to gaining approval for IT initiatives. http://www.infotech.com/research/it-quality-it-communication-with-stakeholders-is-key-to-success
Blueprint: Master External Compliance to Impress Auditors and Minimize Legal Risk		
⚙	Master External Compliance to Impress Auditors and Minimize Legal Risk	This new Guided Implementation Blueprint will be designed to walk our clients step by step through identifying external compliance requirements and implementing changes to become compliant. The process will help mitigate business risk, pass audits, and attain accreditations such as ISO 9001. http://www.infotech.com/research/master-external-compliance-to-impress-auditors-and-minimize-legal-risk
Blueprint: Capitalize on Emerging Trends to Improve Supply Chain Management		
⚙	Capitalize on Emerging Trends to Improve Supply Chain Management	Capitalize on emerging trend to improve supply chain management Technology is always changing, which can transform IT and negatively disrupt organizations that are blindsided by new advancements. This research will help IT gain a better understanding of emerging trends and technologies that can impact the supply chain, identify those that will unlock tangible value for their organization, and conduct a feasibility assessment to obtain management support to proceed with related initiatives. http://www.infotech.com/research/capitalize-on-emerging-trends-to-improve-supply-chain-management
Additional Resources		
🗎	Case Study: IndependenceFirst	View how one CIO used quality communication with stakeholders to gain approval for IT initiatives. http://www.infotech.com/research/it-case-study-independencefirst
🗎	Don't Make Me Document It	I hate paperwork, even if I'm doing it in electronic documents. You know, those administrative tasks intended to track, measure, and update, but which invariably consume my day, distracting me from coming up with that BIG IDEA, or just getting this column written. It’s not that I think paperwork shouldn’t be done; I just don't want to have to do it. And in software development, there is plenty of paperwork: revising requirements after implementation begins, documenting code reviews, describing bugs, updating test cases, etc. http://www.infotech.com/research/dont-make-me-document-it
🗎	Healthcare: Barriers to Technology Implementation Adoption	Implementing new technologies into most organizations is a difficult process. IT managers in the healthcare industry, in particular, have a hard time gaining buy-in for new projects. Pay special attention to physicians when implementing new technologies and focus on what the organization needs to capture maximum value. http://www.infotech.com/research/healthcare-barriers-to-technology-implementation-adoption
🗎	EMR Begins with Document Imaging	For many hospitals worldwide, Electronic Medical Records (EMR) systems are the way of today. Healthcare organizations slow to join the digital wave should begin with document imaging. Understand the first steps to EMR and begin preparations for a wide scale document imaging deployment. http://www.infotech.com/research/emr-begins-with-document-imaging

Type	Document	Description
	Microsoft Goes After Student Mindshare	Microsoft knows that mindshare equals market share, and that attracting users when they are young will inevitably lead to revenue later. To that end, Microsoft offers a hosted suite of services called Live@edu to educational institutions worldwide for free. However, some potential pitfalls need to be considered. http://www.infotech.com/research/microsoft-goes-after-student-mindshare
	Hospitals Get EHR Incentives Now, but May Face Penalties Later	The US government's HITECH bill will infuse over $20 billion into healthcare information technology, providing special incentives to hospitals for adopting Electronic Health Record (EHR) systems. Understand the Medicare incentives hospitals can qualify for, and what financial penalties may be incurred for non-adoption. http://www.infotech.com/research/hospitals-get-ehr-incentives-now-but-may-face-penalties-later
	Physicians Get EHR Incentives Now, But May Face Penalties Later	The US government's HITECH bill will infuse over $20 billion into healthcare information technology, providing special incentives to physicians for adopting Electronic Health Record (EHR) systems at their practices. Understand the Medicare and Medicaid incentives physicians will receive upon EHR adoption, and what financial penalties they may incur for non-adoption. http://www.infotech.com/research/physicians-get-ehr-incentives-now-but-may-face-penalties-later
	EMR Versus EHR: A Letter Makes a Difference	Electronic Medical Record (EMR) and Electronic Health Record (EHR) describe two completely different concepts. However, many healthcare providers, the media, and even the government in the US confuse the market by using the two terms interchangeably. Read this to understand major differences between EMR and EHR and extract optimum benefits from EMR/EHR implementation. http://www.infotech.com/research/emr-versus-ehr-a-letter-makes-a-difference
	Deliver Donations with Donor Database Management for Non-Profits	Management of a donor database is one of IT's many roles in a non-profit. Choose a system to efficiently store, organize, and segregate this information to better manage donor relationships, create more targeted and effective campaigns, and securely share data across organizational functions. http://www.infotech.com/research/deliver-donations-with-donor-database-management-for-non-profits
	Revitalized Tablet PCs Educate	Tablet PCs offer significant potential for teachers and students at all levels of study to motivate interactive learning in and outside of the classroom. Understand the benefits and possible challenges to tablet PC use in education. http://www.infotech.com/research/revitalized-tablet-pcs-educate
	A Tablet PC Checklist for Hospitals and Clinics	Manufacturers have built tablet PCs specifically designed for use within clinics and hospitals. Review these success factors for Tablet PC implementations within the health care industry. http://www.infotech.com/research/a-tablet-pc-checklist-for-hospitals-and-clinics

Type	Document	Description
	Financial Institutions No Strangers to Project Management	While a formal Project Management Office can be seen as an expensive luxury, for enterprises in the financial services sector the value such bodies represent more than outweigh their cost. Compliance pressures necessitate the greater level of attention to detail that formal project management can bring, but financial institutions are making no greater use of these strategies than any other business type. http://www.infotech.com/research/financial-institutions-no-strangers-to-project-management
	Manufacturing: Sharing Information through Forms Automation	The manufacturing sector is comprised of process-oriented businesses that rely on forms to enable communication, data gathering, data sharing and analysis. By engaging in forms automation, manufacturing firms can ensure that simplicity, consistency and accuracy are built into their data collection and reporting processes. http://www.infotech.com/research/manufacturing-sharing-information-through-forms-automation
	Don't Have a NMS? Get One!	Many enterprises do not have a Network Management System (NMS) in place to monitor enterprise LAN and WAN infrastructure for faults and performance issues. Enterprises that lack a NMS also lack insight into network, server, and application performance. With a plethora of low cost or free options available, there is no reason not to have a NMS in place. http://www.infotech.com/research/dont-have-a-nms-get-one
	E-Discovery: What It Is and How It Affects IT	Electronic evidence is now a major deciding factor in court cases. Understand the mechanics of e-discovery prior to the acquisition or implementation of records management and archiving solutions to avoid wasting money on an unnecessary or inappropriate technology. http://www.infotech.com/research/e-discovery-what-it-is-and-how-it-affects-it
	Skype Is Still Not Enterprise Ready...Yet	In late 2005, Info-Tech Research Group published a research urging enterprises to ban the use of Skype when company policy prohibited the use of public peer-to-peer applications. Eighteen months later, we revisit Skype's ability to play nicely in the enterprise. While a lot has changed and Skype has made an effort to become more enterprise friendly, it is not quite enterprise ready. http://www.infotech.com/research/skype-is-still-not-enterprise-readyyet
	CIO Primer: Ad Hoc Systems Management Is a Dinosaur	Ad hoc system management is an outdated and inefficient approach that does not reflect the new demands on IT service delivery. Successfully addressing current and future demands for services requires IT leaders to plan for formal system management tools. http://www.infotech.com/research/cio-primer-ad-hoc-systems-management-is-a-dinosaur
	PC Virtualization: A New Beginning for Thin Client Computing	Virtual PCs remotely accessed from thin clients have definite potential for helping the enterprise reduce PC management complexity while increasing operating efficiency and security. This can be accomplished without sacrificing the user experience. Enterprises already developing virtual infrastructure for servers should evaluate the potential of virtual desktop infrastructure. http://www.infotech.com/research/pc-virtualization-a-new-beginning-for-thin-client-computing

Type	Document	Description
	Managing Paper: What's Old Is New	This technology-driven myth still haunts headlines and marketing brochures. Paper isn't going anywhere. It's a fundamental part of all modern enterprises, and no new application or appliance will replace it despite promises from companies such as Microsoft and EMC. The trick for managers is to separate the corporate and personal functions of paper and to manage them separately. http://www.infotech.com/research/managing-paper-whats-old-is-new

Strategy & Governance: IT Management & Policies

Type	Document	Description
Blueprint: Take a Portfolio Approach to Policy Management		
	Take a Portfolio Approach to Policy Management	Find the right balance between operational efficiency and risk mitigation by managing your policies like a portfolio. http://www.infotech.com/research/take-a-portfolio-approach-to-policy-management
	Storyboard: Take a Portfolio Approach to Policy Management	Manage your policies like a portfolio by prioritizing those that mitigate your greatest risks. http://www.infotech.com/research/storyboard-take-a-portfolio-approach-to-policy-management
	Policy Management Tool	Info-Tech's Policy Management Tool is designed to help you ensure that your portfolio of policies provides adequate coverage of your organization's greatest risks. http://www.infotech.com/research/policy-management-tool
	Policy Action Plan	Use this template to record and track the necessary steps to develop policies or remediate their identified deficiencies. http://www.infotech.com/research/policy-action-plan
	Policy Communication Plan Template	This communication plan template provides a structure for managing communications of policy changes to end users. http://www.infotech.com/research/policy-communication-plan-template
	Policy Management RACI Chart Template	Use the RACI chart in this tool to establish the roles responsible for tasks within your policy management function. http://www.infotech.com/research/policy-management-raci-chart-template
Blueprint: Select and Manage Effective Policies		
	Select and Manage Effective Policies	Take a portfolio approach to policy management to decrease the number of policies you have to write, monitor, and enforce. http://www.infotech.com/research/select-and-manage-effective-policies

Strategy & Governance: IT Strategy & Alignment

Type	Document	Description
Blueprint: Control the Policy Management Lifecycle		
	Storyboard: Control the Policy Management Lifecycle	IT policies can be time-consuming to develop and manage, but they are absolutely necessary governance tools that help protect the enterprise from legal, financial and ethical risk. http://www.infotech.com/research/storyboard-control-the-policy-management-lifecycle

Type	Document	Description
	IT Policy Enforcement Tracking Tool	As policies are violated, tracking those violations is necessary to fair enforcement and ongoing policy improvement. Use this tool to track policy violations and related patterns to improve overall policy quality and enforceability. http://www.infotech.com/research/it-policy-enforcement-tracking-tool
	IT Policy Lifecycle Work Plan	Engaging in an end-to-end policy portfolio overhaul is a significant exercise in communication and logistics. This IT Policy Lifecycle Work Plan will help you keep track of the important needs assessment, development, implementation, and enforcement steps in the policy lifecycle. http://www.infotech.com/research/it-policy-lifecycle-work-plan
	IT Policy Assessment Tool	Performing a needs assessment is the first step in tackling the overhaul of an existing policy portfolio, or even the development of a new single policy. Use this Policy Assessment Tool to systematically identify gaps in the policy portfolio and develop a shortlist of important policies that need to be amended or created from scratch. http://www.infotech.com/research/it-policy-assessment-tool
	IT Policy Development Tool	A tightly focused and well written policy backed by strong communication is much more likely to be followed by users. Follow policy writing best practices to ensure that they are adhered to and enforced in a consistent and predictable manner. http://www.infotech.com/research/it-policy-development-tool
	IT Policy Enforcement Process Tool	Writing IT policies from scratch is onerous and time consuming, but policies are mandatory in most enterprises. Why work harder than you have to? Use this collection of leading policies as a platform for policy portfolio development. http://www.infotech.com/research/it-policy-enforcement-process-tool
	Policy Enforcement: You're Either In or You're Out	Policy enforcement can be a tremendous headache for IT leaders: IT takes the initiative to spearhead policy development and implementation, but the resulting documents often have little clout and are left collecting dust. Protect the organization and make sure all policy enforcement practices are responsibly managed. http://www.infotech.com/research/policy-enforcement-youre-either-in-or-youre-out
	Writing Effective IT Policies	The IT department often is tasked with developing a range of policies to help set behavior expectations with users and to protect the organization from risk. Without writing expertise and business support, this can be asking too much. To help address this challenge, learn the basics of writing IT policies that actually work. http://www.infotech.com/research/writing-effective-it-policies
	IT Strategy Case Study of a Large Electric Utility	As a result of an audit, a large electrical utility in the US sought to mature its approach to IT strategy by evolving it into an effective, repeatable, and auditable process. The utility opted to align its existing process to COBIT 5 to achieve this goal, with assistance from Info-Tech Research Group. http://www.infotech.com/research/it-strategy-case-study-of-a-large-electric-utility

Additional Resources		
	IT Policy Samples List	Writing IT policies from scratch is onerous and time consuming, but policies are mandatory in most enterprises. Why work harder than you have to? Use this collection of leading policies as a platform for policy portfolio development. http://www.infotech.com/research/it-policy-samples-list

Strategy & Governance: Policies Definition & Compliance

Type	Document	Description
	IT Operations Plan Template	Every couple of years, an IT manager or CIO must face the burdensome task of having to create IT operations planning for the enterprise. Use this downloadable tool to do it right. http://www.infotech.com/research/it-operations-plan-template

Strategy & Governance: Risk Management

Type	Document	Description
Blueprint: Create a Formal Risk Management Strategy		
	Create a Formal Risk Management Strategy	Creating a formal risk management strategy allows IT to protect corporate assets, and data while enabling the business to achieve goals faster through the benefits of a formal risk management strategy. When the business is involved, IT is able to gain perspectives and insights that they can incorporate into the risk management strategy. http://www.infotech.com/research/it-create-a-formal-risk-management-strategy
	Storyboard: Create a Formal Risk Management Strategy	Strategize with the business in mind, but be prepared to act alone. http://www.infotech.com/research/it-storyboard-create-a-formal-risk-management-strategy
	WCO IT Risk Profile Tool	Identify risk events; asses the likelihood and impact values, and assign responsibility for mitigation. http://www.infotech.com/research/it-wco-it-risk-profile-tool
	Chief Risk Officer	The role of the Chief Risk Officer is to directly assess and holistically manage all aspects of risk brought to bear on the enterprise by IT security and legislative/regulatory compliance issues. http://www.infotech.com/research/it-chief-risk-officer
	Risk Management Steering Committee Charter	The Risk Management Steering Committee (RMSC) is an excellent tool to make the business accountable for the identification, assessment, mitigation, and communication of risk. Without a charter to control this committee, the It department could find the rest of the enterprise contributing ineffectively to the risk management process. http://www.infotech.com/research/it-risk-management-steering-committee-charter
	Risk Management Action Plan Template	A Risk Management Action Plan template is meant to be used in conjunction with the WCO IT Risk Profile Tool to select, prioritize, and present a set of discrete risk mitigation actions. This template allows the IT leader, or another responsible party, to communicate to relevant stakeholders the main risk mitigation actions that will be taken once the organization's risk profile has been completed or updated. http://www.infotech.com/research/it-risk-management-action-plan-template

Type	Document	Description
▶	Video: Create a Formal Risk Management Strategy	Risk scenarios help IT to get the big-picture understanding of where an organization's risk exposure lies. It should be known that formal risk management adds value to the organization beyond just mitigating risk. http://www.infotech.com/research/video-create-a-formal-risk-management-strategy
Blueprint: Cut PCI Compliance and Audit Costs in Half		
	Cut PCI Compliance and Audit Costs in Half	If you are a merchant, chances are you still need to be PCI compliant or you are in the middle of the process. It doesn't have to be overwhelming or costly. Choose the simplified path, save money, and still achieve compliance. http://www.infotech.com/research/cut-pci-compliance-and-audit-costs-in-half
	Storyboard: Cut PCI Compliance and Audit Costs in Half	If you are a merchant, chances are you still need to be PCI compliant or you are in the middle of the process. It doesn't have to be overwhelming or costly. Choose the simplified path, save money, and still achieve compliance. http://www.infotech.com/research/storyboard-cut-pci-compliance-and-audit-costs-in-half
	PCI Simplification Capture Tool	This capture tool allows organizations to record where they are currently in terms of PCI compliance, to enable summary compliance reporting, as well as analysis of the most appropriate compliance simplification strategies. http://www.infotech.com/research/pci-simplification-capture-tool
	PCI DSS Compliance Communication Plan	Communication is half the battle with PCI compliance. Securing stakeholder buy-in can sometimes be a challenge. Gain support by using business language and focusing on costs saved through simplified compliance strategies. http://www.infotech.com/research/pci-dss-compliance-communication-plan
	PCI DSS Action Plan	Maintaining your compliance-related information in one central location is key in ensuring the success of your PCI compliance efforts. A primary document not only makes your job easier in remaining organized through the compliance, it makes it easier for auditors and stakeholders to review and understand the process. http://www.infotech.com/research/pci-dss-action-plan
Blueprint: Develop a Data Privacy Compliance Strategy		
	Develop a Data Privacy Compliance Strategy	This solution set will help IT leadership respond to expectations from the business to develop a privacy strategy by defining IT's privacy compliance responsibilities. http://www.infotech.com/research/it-develop-a-data-privacy-compliance-strategy
	Storyboard: Develop a Data Privacy Compliance Strategy	The current regulatory environment in the US demonstrates growing intolerance for privacy violators; consequently, privacy is a growing concern for IT leaders. Enterprises with a strategy for privacy compliance are far more successful at maintaining the privacy of individuals than those without one, and 80% of IT leaders surveyed either have a privacy strategy in place or are in the process of developing one. http://www.infotech.com/research/it-storyboard-develop-a-data-privacy-compliance-strategy
	Enterprise Privacy Checklist	Assess your organization's privacy policies and controls to ensure compliance. http://www.infotech.com/research/it-enterprise-privacy-checklist
	Privacy Policy Template	A Privacy Policy serves as a core component of an enterprise's commitment to maintaining the privacy of client, prospect, or constituent information and is a requirement for compliance with many pieces of legislation. http://www.infotech.com/research/it-privacy-policy-template

Type	Document	Description
	Web Privacy Statement	A Web Privacy Statement notifies visitors to your Website of the type of information that the enterprise is collecting, the intention for which the information is collected, and the mechanisms by which the information will be protected. http://www.infotech.com/research/it-web-privacy-statement
	Contract Provisions Template	This document provides a template for contract provisions of onward transfers to third parties where Private Information is concerned. http://www.infotech.com/research/it-contract-provisions-template
	Project Privacy Checklist	Though not tied to a specific piece of privacy legislation, this checklist represents an amalgam of average privacy requirements and can serve as the basis to ensure that the IT department is taking the appropriate information privacy steps. http://www.infotech.com/research/it-project-privacy-checklist
	Privacy Compliance: What Every IT Leader Should Know	The current regulatory environment in the US demonstrates growing intolerance for privacy violators; consequently, privacy is a growing concern for IT leaders. Enterprises with a strategy for privacy compliance are far more successful at maintaining the privacy of individuals than those without one, and 80% of IT leaders surveyed either have a privacy strategy or are in the process of developing one. http://www.infotech.com/research/it-privacy-compliance-what-every-it-leader-should-know
	Information Security Event Analysis Tool	Having an overall view of your organization's security related events is essential to ensure that you are equipped with sufficient capability to deal with the volume and complexity of current and future security events. http://www.infotech.com/research/information-security-event-analysis-tool
Blueprint: Develop a Strategy for PCI DSS Compliance		
	Develop a Strategy for PCI DSS Compliance	Adherence to PCI standards for customer transaction security can reduce the risks of lost payment card processing privileges, lost income due to fraud, and exposure to fines and litigation. http://www.infotech.com/research/develop-a-strategy-for-pci-and-dss-compliance
	Storyboard: Develop a PCI DSS Compliance Strategy	Adherence to the PCI Standards for Data Security protects client data and mitigates the risks of lost income due to fraud and even loss of card processing privileges. But rather than waiting on financial institutions to direct strategy, enterprises must take ownership of their own strategy for protecting card data. This solution set will help you develop a strategy that addresses data security while keeping compliance efforts in line with external stakeholder expectations http://www.infotech.com/research/storyboard-develop-a-pci-dss-compliance-strategy
	PCI DSS Roadmap and Checklist Tool	The payment card industry data security standards (PCI DSS) includes 12 domains and roughly 225 controls - keeping track of these controls can be a daunting task. Use this tool to plan for, track and manage PCI DSS compliance efforts. http://www.infotech.com/research/pci-dss-roadmap-and-checklist-tool
	Understand Your PCI DSS Compliance Options	Adherence to the PCI Standards for Data Security protects client data and mitigates the risks of lost income due to fraud and even loss of card processing privileges. Rather than waiting on financial institutions to direct their strategy, enterprises must take ownership of their own strategy for protecting client card data. This video summarizes finding from Info-Tech's research. http://www.infotech.com/research/understand-your-pci-dss-compliance-options

Type	Document	Description
▶	PCI DSS 2.0: On the Right Track!	October 2010 saw the introduction of a new version of the payment card industry data security standard (PCI DSS). Understand the implications of changes within PCI DSS 2.0 and how they will affect your organization. This covers the most significant changes to the PCI DSS and introduces a means to address those changes. http://www.infotech.com/research/it-pci-dss-20-on-the-right-track
Blueprint: Develop an Information Governance Strategy		
	Data Classification Guide	Classify your organization's data to ensure information governance of retention periods, sensitivity, and value. http://www.infotech.com/research/data-classification-guide
	Information Security Event Analysis Tool	Having an overall view of your organization's security related events is essential to ensure that you are equipped with sufficient capability to deal with the volume and complexity of current and future security events. http://www.infotech.com/research/information-security-event-analysis-tool
	Information Security Event Analysis Tool	Having an overall view of your organization's security related events is essential to ensure that you are equipped with sufficient capability to deal with the volume and complexity of current and future security events. http://www.infotech.com/research/information-security-event-analysis-tool
	Enterprise Privacy Checklist	Assess your organization's privacy policies and controls to ensure compliance. http://www.infotech.com/research/it-enterprise-privacy-checklist
	Retention Schedule Template	Define policies around information retention and destruction in order to ensure compliance. http://www.infotech.com/research/retention-schedule-template
	Risk Assessment Management Using COBIT 5	Engaging with Info-Tech to conduct a COBIT-based operations workshop on risk management was a natural next step. http://www.infotech.com/research/risk-assessment-management-using-cobit-5
	SDLC Control Sheet	Use this checklist to document the Software Development Life Cycle in preparation for Sarbanes-Oxley audits. http://www.infotech.com/research/sdlc-control-sheet
	Chief Risk Officer	The role of the Chief Risk Officer is to directly assess and holistically manage all aspects of risk brought to bear on the enterprise by IT security and legislative/regulatory compliance issues. http://www.infotech.com/research/it-chief-risk-officer
	Corporate Compliance Officer	The role of the Corporate Compliance Officer is to oversee and review all legal technology issues across the organization. This includes providing objective assessments of the company's compliance to legislation governing the organization's information technology systems and industry-specific regulations. The Corporate Compliance Officer will also direct the development and implementation of policies and procedures to ensure that the organization's practices remain observant to all pertinent local, state/province/county, and federal laws. http://www.infotech.com/research/corporate-compliance-officer
	Electronic Records Manager	The role of the Electronic Records Manager is to ensure that all corporate records are stored electronically in a manner that complies with all applicable laws and industry regulations. http://www.infotech.com/research/electronic-records-manager
	Chief Privacy Officer	The role of the Chief Privacy Officer is to provide vision and leadership for developing and supporting initiatives critical to the organization's information privacy practices. http://www.infotech.com/research/chief-privacy-officer

Type	Document	Description
	Risk Management Case Study of a Small University	A small university in the American mid-west needed to introduce its IT stakeholders to key risk concepts as part of a new, broader IT governance mission. By gaining a realistic and shared understanding of what risk really means, the IT department was able to build its internal brand as risk experts and start working on risk management initiatives quickly, saving substantial time. http://www.infotech.com/research/risk-management-case-study-of-a-small-university
	Risk Management Case Study of a Regional Grocery Chain	A 20-person IT department in a mid-sized regional grocery retailer received a mandate from its Board of Directors to reapproach and increase its risk management activities. Using Info-Tech's workshop and featured IT Risk Profile Tool, the grocery retailer was able to identify key areas of risk - Security & Compliance, and IT Governance & Operations - and develop a detailed plan to tackle risk mitigation. http://www.infotech.com/research/risk-management-case-study-of-a-regional-grocery-chain
	Risk Management Case Study of a Global Chemical Manufacturing Firm	An Asian-headquartered chemical manufacturing organization with an 80-year history and facilities in over 20 countries wants to assess IT risks for its operations in the Americas. The company's American IT team participated in an Info-Tech workshop with the specific goals of becoming more knowledgeable about IT risk management, identifying key issues, planning actions to reduce priority risks, and communicating more effectively about IT risk issues with executive leadership. http://www.infotech.com/research/risk-management-case-study-of-a-global-chemical-manufacturing-firm
Blueprint: Mitigate Internal Risks & Achieve Compliance with Internal Controls		
	Storyboard: Mitigate Internal Risks & Achieve Compliance with Internal Controls	Internal risk demands internal controls. However, strong controls can inhibit the business process. Balance the risk mitigation benefits of internal controls with the impact they have on business process and the investment required deploy them. http://www.infotech.com/research/it-storyboard-mitigate-internal-risks-achieve-compliance-with-internal-controls
	Data Classification Guide	Classify your organization's data to ensure information governance of retention periods, sensitivity, and value. http://www.infotech.com/research/data-classification-guide
Blueprint: Implement and Execute a Security Risk Management Program		
	Implement and Execute a Security Risk Management Program	When an organization knows their risk tolerance level, they can determine what their true risk priorities are, successfully establish the rest of their agenda, and proactively be more prepared to deal with issues facing their operations. http://www.infotech.com/research/implement-and-execute-a-security-risk-management-program
Blueprint: Risk Management		
	Risk Management	Our Risk Management Research is designed to enable you to make yourself World Class by: breaking down Risk Management into digestible steps, providing actionable instructions to complete each step and providing all the strategy tools and templates you need http://www.infotech.com/research/risk-management
Vendor Landscape: eGRC Solutions		
	Vendor Landscape: eGRC Solutions	Companies considering GRC solutions should focus on those who are mapped to the Unified Compliance Framework. http://www.infotech.com/research/it-vendor-landscape-egrc-solutions

Type	Document	Description
	Vendor Landscape Storyboard: eGRC Solutions	eGRC solutions can help demystify the world of governance, risk, and compliance, but need to be rightsized to fit your organizations current GRC and security investments. http://www.infotech.com/research/vendor-landscape-storyboard-egrc-solutions
	eGRC Software Vendor Shortlist Tool	This tool generates a shortlist of eGRC software providers based on necessary capabilities and requirements. http://www.infotech.com/research/it-egrc-software-vendor-shortlist-tool
Additional Resources		
	Healthcare: Preparing for the Coding Migration	Healthcare organizations now have more time to implement the new set of disease classification codes, but this is not the time to relax. IT should begin the planning process as soon as possible to prepare for a challenging and lengthy migration. http://www.infotech.com/research/healthcare-preparing-for-the-coding-migration
	How to Keep SharePoint HIPAA-Compliant	SharePoint can help healthcare organizations improve internal communication and streamline business processes, but it can also increase the risk of HIPAA violations. Take advantage of SharePoint's built-in security features to facilitate compliance. http://www.infotech.com/research/how-to-keep-sharepoint-hipaa-compliant
	ePedigree Safeguards Drug Supplies	An ePedigree program assists in safeguarding against counterfeit drug activities while ensuring the protection of business interests. Consider the implementation of an ePedigree program while keeping a sharp eye on the legislative environment to prepare for future compliance. http://www.infotech.com/research/epedigree-safeguards-drug-supplies
	Companies That Lose Our Data Don't Deserve Our Business	On Feb. 27, 2008, the Bank of New York Mellon shipped a tape containing the personal information of more than 4.5 million clients to an Archive America offsite storage facility. That tape never arrived. The information contained on the tape included (among other things) names, birthdates, and Social Security numbers-exactly the information desired by identity thieves. Even though the information contained on the tape was clearly of an extremely sensitive nature, encryption was not used. Loss of the tape was not reported until almost a month later, and it has yet to be recovered. Although Archive America lost the tape, BNY Mellon is in the news because the data was entrusted to BNY Mellon by its customers in the first place. http://www.infotech.com/research/companies-that-lose-our-data-dont-deserve-our-business
	Government Agencies: Revisit the E-Government Act	The E-Government Act of 2002 was designed by the U.S. federal government to increase government efficiency through the use of IT resources. Review E-Government initiatives to take advantage of how the Act benefits both public and private enterprises. http://www.infotech.com/research/government-agencies-revisit-the-e-government-act
	FACTA Throws a Red Flag on the Play	With the occurrence of identity theft on the rise, and with it the vast number of dollars that are stolen, section 114 of the Fair and Accurate Credit Transactions Act, otherwise known as the Red Flag rules, is a necessary piece of legislation. Its sweep is far ranging, its requirements stringent and the deadline for compliance is looming. Understand the rule and its requirements and prepare the enterprise now. http://www.infotech.com/research/facta-throws-a-red-flag-on-the-play

Type	Document	Description
	PCI Still Fresh in Minds of Retailers	Complying with the Payment Card Industry (PCI) Data Security Standards (DSS) is mandatory for all retailers, yet many still do not conform. The processes for achieving compliance are clearly defined and straightforward to follow. Ensure compliance to avoid potential fines, service interruptions, and irreparable damage to brand image. http://www.infotech.com/research/pci-still-fresh-in-minds-of-retailers

Strategy & Governance: Standards Definition & Compliance

Type	Document	Description
	Information Technology Standards and Guidelines Tool	Even if written policies and procedures do exist, they may be fragmented, out of date, or so underused they are difficult to locate. Tracking down what you have creates a baseline for future policy and procedure development work. Use the "Information Technology Standards and Guidelines Tool" to document standard IT products and tools to inform your policy and procedure-setting activities. http://www.infotech.com/research/information-technology-standards-and-guidelines-tool
	Document Retention Policy	Download this document retention policy template to help you design and enforce a policy to mitigate risk. http://www.infotech.com/research/document-retention-policy
	Application Consolidation Planning	Many organizations initiate applications consolidation projects with an ambitious outlook, only to have them abort or fail because they didn't assess the feasibility of consolidating the particular applications. http://www.infotech.com/research/it-application-consolidation-planning

Strategy & Governance: Strategy & Alignment

Type	Document	Description
Blueprint: Establish the Benefits Realization Process		
	Establish the Benefits Realization Process	People treat benefits as a box to tick on the business case, deflating or inflating them to facilitate project approval. The project sponsor and business unit leaders must own project benefits; IT should only accountable for delivering the solution. http://www.infotech.com/research/establish-the-benefits-realization-process
	Storyboard: Establish the Benefits Realization Process	By establishing a benefits realization process, IT can ensure that its projects realize their true potential and provide extraordinary value to the enterprise. http://www.infotech.com/research/storyboard-establish-the-benefits-realization-process
	Benefits Realization Assessment Survey	Use this survey to assess the level of project and benefits realization success at your organization. You will use the results of this survey as inputs to Info-Tech's Benefits Realization Assessment Tool. http://www.infotech.com/research/benefits-realization-assessment-survey
	Project Change Request Form	This Project Change Request Template should be filled out by the customer or employee requesting the change, then submitted to the Project Manager for assessment. http://www.infotech.com/research/project-change-request-form

Type	Document	Description
	Benefits Realization Assessment Tool	This tool will help you assess both project and process success, assessing the degree to which benefits are defined, managed, and realized. http://www.infotech.com/research/benefits-realization-assessment-tool
	Benefits Realization Handbook Template	Use this template as you complete the blueprint, Establish a Benefits Realization Process, to document the outcome of each project step. http://www.infotech.com/research/benefits-realization-handbook-template
	Portfolio Benefits Tracking Tool	Conduct an analysis of business benefits expected to be delivered by the projects in your portfolio. http://www.infotech.com/research/portfolio-benefits-tracking-tool
	Project Benefits Documentation Workbook	Document the originally projected benefit realization timeline from a project's business case, as well any adjustments made to this timeline due to the effects of change requests. http://www.infotech.com/research/project-benefits-documentation-workbook
	Quick Portfolio Benefits Tracking Tool	Conduct an analysis of business benefits expected to be delivered by the projects in your portfolio. http://www.infotech.com/research/quick-portfolio-benefits-tracking-tool
	Quick Project Benefits Documentation Workbook	Document the originally projected benefit realization timeline from a project's business case, as well any adjustments made to this timeline due to the effects of change requests. http://www.infotech.com/research/quick-project-benefits-documentation-workbook
Blueprint: Make IT a Partner in Successful M&A Due Diligence		
	Make IT a Partner in Successful M&A Due Diligence	Even though IT-related activities can be the largest cost item in an M&A, many organizations continue to underestimate the role IT plays in successfully executing a merger or acquisition. Getting IT involved during the due diligence phase is critical to providing a better view of risks, improving the ease of integration, and optimizing post-deal synergies. http://www.infotech.com/research/make-it-a-partner-in-successful-m-a-due-diligence
	Storyboard: Make IT a Partner in Successful M&A Due Diligence	Organizations continue to underestimate the role of IT in M&A transactions. The involvement of IT in the due diligence phase is critical to providing a better view of risks, improving the ease of integration, and optimizing synergies post-merger. http://www.infotech.com/research/storyboard-make-it-a-partner-in-successful-m-a-due-diligence
	IT Due Diligence Charter	Create a due diligence charter to socialize the M&A project with key stakeholders and gain buy-in and support. http://www.infotech.com/research/it-due-diligence-charter
	IT Due Diligence Report	This tool helps the CIO and IT due diligence team with tracking and documenting ongoing information discoveries throughout the due diligence phase of an M&A transaction. http://www.infotech.com/research/it-due-diligence-report
	IT M&A Capabilities Readiness Check Template	The M&A Capabilities Readiness Check is a diagnostic that helps CIOs gain visibility into their current capability to support an M&A transaction. http://www.infotech.com/research/it-m-a-capabilities-readiness-check-template

Type	Document	Description
	Make the Case for IT Involvement in M&A Due Diligence Presentation Template	Gain the trust and buy-in from executive management by providing a brief presentation that highlights IT's ability to accelerate the realization of post-integration synergies, while identifying major complexities early-on that may limit the attractiveness of proposed M&A targets. http://www.infotech.com/research/make-the-case-for-it-involvement-in-m-a-due-diligence-presentation-template
Blueprint: Tailor an IT Governance Plan to Fit Organizational Needs		
	Tailor an IT Governance Plan to Fit Organizational Needs	IT governance is the number one predictor of value generated by IT, yet many organizations struggle to implement effectively. Effective IT governance encompasses the spectrum of IT decision making, and spans across IT. Use Info-Tech's five-step process for optimizing your IT governance structure and processes. http://www.infotech.com/research/tailor-an-it-governance-plan-to-fit-organizational-needs
	Storyboard: Tailor an IT Governance Plan to Fit Organizational Needs	This do-it-yourself guide will help the CIO optimize their IT governance structure and processes. http://www.infotech.com/research/storyboard-tailor-an-it-governance-plan-to-fit-organizational-needs
	IT Governance Change Communication Plan Template	The IT Governance Change Communication Plan Template organizes the messages about planned changes. http://www.infotech.com/research/it-governance-change-communication-plan-template
	IT Governance Optimization Project Charter Template	The IT Governance Optimization Project Charter Template is used to communicate the value and rationale for IT governance optimization to key stakeholders. http://www.infotech.com/research/it-governance-optimization-project-charter-template
	IT Governance Presentation Deck Template	The IT Governance Presentation Deck Template provides a vehicle to communicate IT Governance recommendations to stakeholders and gain buy-in. http://www.infotech.com/research/it-governance-presentation-deck-template
	IT Governance Project Plan Template	The IT Governance Project Plan Template helps you identify and assign accountability for the tasks needed to complete the new governance structure. http://www.infotech.com/research/it-governance-project-plan-template
	IT Governance Reference Book Template	The IT Governance Reference Book Template provides stakeholders with key information about the governance optimization project. http://www.infotech.com/research/it-governance-reference-book-template
	IT Governance Stakeholder and Communication Planning Template	Track your stakeholders and plan your communication with them. http://www.infotech.com/research/it-governance-stakeholder-and-communication-planning-template
	IT Governance Structure Selection Tool	The IT Governance Structure Selection Tool assesses your organization's governance capabilities and provides recommendations for target committee structures and processes. http://www.infotech.com/research/it-governance-structure-selection-tool

Type	Document	Description
	Organizational Change Impact Assessment Tool	The Organizational Change Impact Assessment Tool outlines the impact of the change in your organization. http://www.infotech.com/research/organizational-change-impact-assessment-tool
Blueprint: Transfer IT Knowledge Before It's Gone		
	Transfer IT Knowledge Before It's Gone	Use Info-Tech's 5 step process to build a fit-for-purpose IT Knowledge Transfer Roadmap. Our client tested methodology and project steps allow you to tailor your knowledge transfer plan to any size of organization, across industries. http://www.infotech.com/research/transfer-it-knowledge-before-it-s-gone
	Storyboard: Transfer IT Knowledge Before It's Gone	Info-Tech's five step process to build a fit-for-purpose IT Knowledge Transfer Roadmap allows you to tailor your knowledge transfer plan to any size organization across industries. http://www.infotech.com/research/storyboard-transfer-it-knowledge-before-it-s-gone
	IT Knowledge Identification Interview Guide Template	The IT Knowledge Identification Interview Guide Template is used to provide a framework to conduct interviews with knowledge sources to extract the information they have http://www.infotech.com/research/it-knowledge-identification-interview-guide-template
	IT Knowledge Transfer Plan Template	The IT Knowledge Transfer Plan Template is used to determine the most effective knowledge transfer tactics to be used for each knowledge source. http://www.infotech.com/research/it-knowledge-transfer-plan-template
	IT Knowledge Transfer Project Charter Template	The IT Knowledge Transfer Project Charter Template is used to communicate the value and rationale for knowledge transfer to key stakeholders. http://www.infotech.com/research/it-knowledge-transfer-project-charter-template
	IT Knowledge Transfer Risk Assessment Tool	The IT Knowledge Transfer Risk Assessment Tool is used to identify the risk profile of knowledge sources and the knowledge they have. http://www.infotech.com/research/it-knowledge-transfer-risk-assessment-tool
	IT Knowledge Transfer Roadmap Presentation Template	The IT Knowledge Transfer Roadmap Presentation Template provides a vehicle used to communicate IT Knowledge Transfer recommendations to stakeholders and gain buy-in. http://www.infotech.com/research/it-knowledge-transfer-roadmap-presentation-template
	Project Stakeholder Register Template	Track your stakeholders and their support position for your project. http://www.infotech.com/research/project-stakeholder-register-template
Blueprint: Build a Culture of IT Innovation		
	Build a Culture of IT Innovation	Business and IT leaders have come under increasing pressure to reduce costs while maintaining organizational effectiveness. IT does not have the capability to do this, using its existing toolbox. http://www.infotech.com/research/it-build-a-culture-of-it-innovation
	Storyboard: Build a Culture of IT Innovation	Pull the right levers to promote innovation in your IT department. Review the six most important cultural preconditions for fostering innovation in the IT department. http://www.infotech.com/research/it-storyboard-build-a-culture-of-it-innovation

Type	Document	Description
	Innovation Roadmap & Cost Estimator Tool	Assess your IT department for the six key preconditions of IT innovation. Learn the precondition priorities for your IT department and plan your roadmap to innovation success. http://www.infotech.com/research/it-innovation-roadmap-cost-estimator-tool
	Cultivating IT Innovation	Evaluate the areas where your organization needs to improve, and plan specific steps that Info-Tech recommends to foster IT innovation. http://www.infotech.com/research/it-cultivating-it-innovation
	Stakeholder Power Map Template	Identify and prioritize the stakeholders that are important to your IT strategy development effort. http://www.infotech.com/research/it-stakeholder-power-map-template
Blueprint: Create a Cloud-Enabled IT Organization		
	Create a Cloud-Enabled IT Organization	The cloud is currently the greatest disruptor of in-house IT organizations. It demands a new IT model to restore IT's relevance and prevent it from being completely disenfranchised. http://www.infotech.com/research/create-a-cloud-enabled-it-organization
	Storyboard: Create a Cloud-Enabled IT Organizational Structure	The cloud is currently the greatest disruptor of in-house IT organizations. Use this storyboard to transition to a new IT model to restore IT's relevance and prevent IT from being completely disenfranchised. http://www.infotech.com/research/storyboard-create-a-cloud-enabled-it-organizational-structure
	Cloud Organizational Impact Assessment	A tool to help determine how your organization might be affected by cloud technology should you choose to move your services there. http://www.infotech.com/research/cloud-organizational-impact-assessment
	Core Capability Mapping Tool	Use this tool to assess the level of capability of your IT staff. http://www.infotech.com/research/core-capability-mapping-tool
	Business Capabilities Architect	Job Description for the Business Capabilities Architect role. http://www.infotech.com/research/business-capabilities-architect
	Cloud Security Specialist	Job Description for the Cloud Security Specialist role. http://www.infotech.com/research/cloud-security-specialist
	Emerging Technology Analyst	Job Description for the Emerging Technology Analyst role. http://www.infotech.com/research/emerging-technology-analyst
	Information Flow Architect	Job Description for the Information Flow Architect role. http://www.infotech.com/research/information-flow-architect
	Business Analyst	Job Description for the Business Analyst role. http://www.infotech.com/research/business-analyst
	Service Integration Architect	Job Description for the Service Integration Architect role. http://www.infotech.com/research/service-integration-architect
	Strategic Sourcing Specialist	Job Description for the Strategic Sourcing Specialist role. http://www.infotech.com/research/strategic-sourcing-specialist
	Business Relationship Manager	The Business Relationship Management function has the mandate to establish a relationship between IT and the business and increase the value realized from IT assets, investments, and capabilities. http://www.infotech.com/research/it-business-relationship-manager
	Transformation Planning Template	A template to define and plan the activities that are appropriate for your transformation. http://www.infotech.com/research/transformation-planning-template
	Communications Planning Template	A template for planning your communications with stakeholders. http://www.infotech.com/research/communications-planning-template
	Learning Plan Template	Address your knowledge and skill gaps with a learning plan template. http://www.infotech.com/research/learning-plan-template

Type	Document	Description
	Stakeholder Management Template	Document stakeholder information using this template. http://www.infotech.com/research/stakeholder-management-template
	Transition Checklist Template	A checklist outlining the steps to organizational change. http://www.infotech.com/research/transition-checklist-template
	Transition FAQs Template	A template for tracking frequently asked questions about organizational change. http://www.infotech.com/research/transition-faqs-template
	Transition Planning Template	A template to track each major milestone of your organizational change. http://www.infotech.com/research/transition-planning-template
	IT Staffing Changes Business Case Template	This template will help you build a business case for staffing changes in IT. http://www.infotech.com/research/it-staffing-changes-business-case-template
	Stakeholder Power Map Template	Identify and prioritize the stakeholders that are important to your IT strategy development effort. http://www.infotech.com/research/it-stakeholder-power-map-template
	Stakeholder Power Map Template	Identify and prioritize the stakeholders that are important to your IT strategy development effort. http://www.infotech.com/research/it-stakeholder-power-map-template
Blueprint: Decode the Real Corporate Strategy		
	Decode the Real Corporate Strategy	Real corporate strategy is often either undocumented, may be in distinct business unit or departmental strategies, or is stated at such a high level that it is not possible for IT to take action. http://www.infotech.com/research/it-decode-the-real-corporate-strategy
	Policy for Special Request Handling	Separate guidelines should be defined when handling non-project requests in the IT department. Non-project requests are often handled differently than project requests due to smaller budget and shorter time frames. This template outlines the rules of engagement for handling these requests. http://www.infotech.com/research/policy-for-special-request-handling
Blueprint: Get IT in Line with Organizational Needs		
	Get IT in Line with Organizational Needs	IT leaders must wear many hats in order to address both operational and strategic initiatives as laid out by the business. They need to formalize process, stabilize technology, and bring key people on board. http://www.infotech.com/research/it-determine-the-appropriateness-of-its-maturity-level
	Storyboard: Get IT in Line with Organizational Needs	Ninety-six percent of respondents believe that IT activities and the IT department maturity level must be aligned with business priorities and plans, but only 41% are actually parallel. This storyboard helps assess the current and ideal levels of IT maturity and provides advice on how to proceed if a gap exists. http://www.infotech.com/research/it-storyboard-get-it-in-line-with-organizational-needs
	IT Maturity Level Diagnostic Tool, Needs Analysis, and Readiness Assessment	Every IT department needs to match its maturity level with the needs and wants of the organization, not the desires and interests of the IT team. There are three levels of IT maturity: firefighting, housekeeping, and innovating. As IT departments increase their maturity level, they move from reactivity to proactivity to creativity and become increasingly successful. http://www.infotech.com/research/it-it-maturity-level-diagnostic-tool-needs-analysis-and-readiness-assessment

Blueprint: Improve Value & Mitigate Risk through IT Governance		
	Improve Value & Mitigate Risk through IT Governance	This research will enable IT Leaders to get the executive support needed to adopt IT governance with the objective of improving performance measures, accountabilities, and decision-making in the areas of IT financial management, risk management, service management, and project portfolio management. http://www.infotech.com/research/it-improve-it-value-mitigate-risk-with-it-governance
	Storyboard: Improve Value & Mitigate Risk through IT Governance	Effective decision-making is critical to the governance of IT investments, projects, service delivery, and risk, all of which keep the business in business. http://www.infotech.com/research/it-storyboard-improve-value-mitigate-risk-through-it-governance
	IT Executive Committee Challenge Assessment Tool	Answer the questionnaire in this tool to find out whether the organization is prepared to establish an IT Executive Committee. http://www.infotech.com/research/it-it-executive-committee-challenge-assessment-tool
	Stakeholder Power Map Template	Identify and prioritize the stakeholders that are important to your IT strategy development effort. http://www.infotech.com/research/it-stakeholder-power-map-template
	Business Advisory Committee Charter	The purpose of the Business Advisory Committee (BAC) is to review and prioritize project proposals from the business units, creating a shortlist of recommended proposals for consideration by the IT Executive Committee. http://www.infotech.com/research/it-business-advisory-committee-charter
	Project Steering Committee Meeting Agenda	This template provides a guideline for agenda planning of steering committee meetings. It outlines how long certain agenda items should take, as well as what should be covered in the meeting to get the most out of the discussion. http://www.infotech.com/research/it-project-steering-committee-meeting-agenda
	Executive Project Scorecard	To effectively communicate with senior management, IT leaders can use this scorecard to provide updates on projects delivered by IT. http://www.infotech.com/research/it-executive-project-scorecard
	IT Activity Assessment Meeting Agenda	This template provides a guideline for agenda planning of IT Activity Assessment meetings. It outlines how long certain agenda items should take, as well as what should be covered in the meeting to get the most out of the discussion. http://www.infotech.com/research/it-it-activity-assessment-meeting-agenda
	Executive IT Committee Charter	The Executive IT Committee is an excellent tool to make the business accountable for the IT investment decisions it wants made. This charter outlines key members, agenda items, the purpose of the committee, as well as the committee's formal mandate. http://www.infotech.com/research/executive-it-committee-charter
Blueprint: Institutionalize Innovation through IT		
	Institutionalize Innovation through IT	Leverage IT's strong multi-department spanning position to facilitate innovation across the enterprise. http://www.infotech.com/research/it-institutionalize-innovation-through-it
	Storyboard: Institutionalize Innovation through IT	Leverage IT's strong multi-department spanning position to facilitate innovation across the enterprise. http://www.infotech.com/research/it-storyboard-institutionalize-innovation-through-it
	Innovation Ideas Prioritization Tool	Transpose high value prototype proposals into this tool and score them appropriately based on cost and value weightings to identify which ideas to pursue. http://www.infotech.com/research/it-innovation-idea-prioritization-tool

	Innovation Performance Tracking Template	This template will help keep track of the performance and success of innovation efforts within the organization. http://www.infotech.com/research/it-innovation-performance-tracking-template
	Ideas to Prototype Proposal Template	Make this idea proposal template available to all employees and encourage them to propose innovation ideas. http://www.infotech.com/research/it-ideas-to-prototype-proposal-template
	Innovation Oversight Board Charter	This Innovation Oversight Board Charter template provides the necessary activities and features of the group. http://www.infotech.com/research/it-innovation-oversight-board-charter
	Innovation Support Group Charter	This Innovation Support Group Charter template provides the necessary activities and features of the group. http://www.infotech.com/research/it-innovation-support-group-charter
	IT Steering Committee Charter	An IT Steering Committee is an excellent tool for making business accountable for the IT investment decisions it wants made. A charter is an essential document for defining the scope and purpose of this committee. Use this template to draft a committee charter. http://www.infotech.com/research/it-steering-committee-charter
	Merger & Acquisition Target Technology Environment Selection Tool	Deciding on a post-merger target technology environment is a crucial planning step for IT professionals who are about to go through a merger or acquisition (M&A). Use Info-Tech's Merger & Acquisition Target Technology Environment Selection Tool to choose a post-merger technology environment that will align IT with the business objectives of the M&A. http://www.infotech.com/research/merger--acquisition-target-technology-environment-selection-tool
	Merger & Acquisition Project Planning and Monitoring Tool	92% of IT professionals who achieve their merger and acquisition (M&A) goals create an M&A plan with specific timelines outlined for application, infrastructure, data, and staff integration. Use Info-Tech's Merger and Acquisition Project Planning and Monitoring Tool to ensure that IT is prepared for two organizations to begin operating as a combined entity. http://www.infotech.com/research/merger--acquisition-project-planning-and-monitoring-tool
Blueprint: Make the Case for the Hybrid IT Operating Model		
	Storyboard: Make the Case for the Hybrid IT Operating Model	Find the right balance between centralized and decentralized IT operating models. http://www.infotech.com/research/it-storyboard-make-the-case-for-the-hybrid-it-operating-model
	IT Service Catalog Inventory Tool	Take an inventory of IT services throughout the organization. http://www.infotech.com/research/it-service-catalog-inventory-tool
	Option Prioritization and Shortlist Tool	The purpose of this tool is to formally prioritize project options (based on their respective Value and Cost) and to shortlist project options (based on their respective Value and Urgency). http://www.infotech.com/research/option-prioritization-and-shortlist-tool
	IT Operating Model Assessment Tool	Assess the IT operating model in the organization by interpreting the demand for integration through 10 factors. http://www.infotech.com/research/it-it-operating-model-assessment-tool
	Business Relationship Manager	The Business Relationship Management function has the mandate to establish a relationship between IT and the business and increase the value realized from IT assets, investments, and capabilities. http://www.infotech.com/research/it-business-relationship-manager

Blueprint: Move to a Stable & Controlled IT Department		
	Move to a Stable & Controlled IT Department	Many IT departments are stuck in Firefighting mode and don't have the time or resources to get out of it. The transition IT makes to move from Firefighting mode requires that aspects of process, technology and people be adjusted. http://www.infotech.com/research/it-move-to-a-stable-controlled-it-department
	Storyboard: Move to a Stable & Controlled IT Department	Many IT departments live in Firefighting mode. They deal with chaos, instability, and stress on a daily basis. Remaining in this state is inefficient and unsustainable, yet most organizations don't have the time or resources to escape it. http://www.infotech.com/research/it-storyboard-move-to-a-stable-controlled-it-department
	Firefighter to Housekeeper Prioritization Tool	The purpose of this tool is to help IT leaders determine what they need to do to move their IT department from a state of firefighting to one of stability and planned operations. http://www.infotech.com/research/it-firefighter-to-housekeeper-prioritization-tool
	Business Stakeholder Interview Guide	Business stakeholders are not programmed to voluntarily present IT with their requirements and expectations. When the need for stakeholder management is heightened - at the start of projects and during periods of change - conduct structured interviews with key stakeholders, narrow down their needs, and secure IT's needs too. http://www.infotech.com/research/business-stakeholder-interview-guide
	Business Stakeholder Satisfaction Survey	Collecting stakeholder feedback on IT's day-to-day performance is essential for meeting stakeholder expectations. Conduct regular business stakeholder satisfaction surveys to measure IT's performance, and understand where improvement is needed. http://www.infotech.com/research/business-stakeholder-satisfaction-survey
	IT Status Report	Frequent communication with stakeholders not only demonstrates IT's value, but also helps control demand, justify expenditure, and secure staff for future projects. Send regular status reports to your stakeholders to keep them informed about IT's value and ensure their support. http://www.infotech.com/research/it-status-report-
	IT Annual Report	Communicating the value of IT to business stakeholders can be very challenging. IT is expected to operate a reliable and responsive utility and deliver solutions and services that are strategic to business success. At least once each year, document and communicate IT's accomplishments, goals and objectives using a well-structured annual report. http://www.infotech.com/research/it-annual-report
Blueprint: Align IT with the Real End Customer		
	Align IT with the Real End Customer	Being customer-centric is not just a new buzzword. By taking a holistic, step-by-step approach to customer-centricity in IT, the CIO can add significant business value. http://www.infotech.com/research/align-it-with-the-real-end-customer
	Storyboard: Align IT with the Real End Customer	Ensure IT and the business are working towards the same goal: Improving customer experience. http://www.infotech.com/research/storyboard-align-it-with-the-real-end-customer

	IT and Customer Alignment Planning Workbook	Plan the process, organizational, and measurement components of your IT and customer alignment project. http://www.infotech.com/research/it-and-customer-alignment-planning-workbook
	IT and Customer Alignment Project Charter	Win the support of your stakeholders by demonstrating how this project supports their business drivers. http://www.infotech.com/research/it-and-customer-alignment-project-charter
	IT and Customer Alignment Project Communication Plan Template	Document the key messages, mediums, and logistics of important communications. http://www.infotech.com/research/it-and-customer-alignment-project-communication-plan-template
	IT and Customer Alignment Stakeholder Interview Guide	Conduct interviews to harness input from your key stakeholders. http://www.infotech.com/research/it-and-customer-alignment-stakeholder-interview-guide
	IT and Customer Alignment Stakeholder Presentation Template	Update stakeholders on your IT and Customer Alignment plans to inspire them to help IT achieve its goals. http://www.infotech.com/research/it-and-customer-alignment-stakeholder-presentation-template
	Training Plan Template	Use this Training Plan as a starting point for outlining how you will bring your employees up to speed on changes. http://www.infotech.com/research/training-plan-template
Blueprint: Optimize the Benefits Delivery Process		
	Optimize the Benefits Delivery Process	With a good benefits delivery process, you can ensure that your projects realize expected benefits and provide value to the enterprise. Too often, the benefits defined in the business case are forgotten once the project is underway, and are not achieved when the project is completed. http://www.infotech.com/research/optimize-the-benefits-delivery-process
Blueprint: Decode the Corporate Strategy		
	Decode the Corporate Strategy	CIOs must help the business achieve goals and objectives. IT planning must be based on corporate strategy; achieving a clear and agreed upon vision of corporate strategy is the foundation upon which the IT strategy is built. http://www.infotech.com/research/decode-the-corporate-strategy
	Storyboard: Decode the Corporate Strategy	This blueprint walks the CIO through developing clarity and consensus around strategic business objectives. http://www.infotech.com/research/storyboard-decode-the-corporate-strategy
	Corporate Capability Map	This template is used to map current corporate capabilities and changes to capabilities that occur due to corporate initiatives. http://www.infotech.com/research/corporate-capability-map
	Corporate Strategy Documentation Template	This template is used to document corporate objectives, initiatives, and capability changes. http://www.infotech.com/research/corporate-strategy-documentation-template
	Corporate Strategy Interview Guide	This template is used to conduct stakeholder interviews for the purpose of understanding corporate strategy. http://www.infotech.com/research/corporate-strategy-interview-guide
Blueprint: Establish an Effective PMO for IT		
	Establish an Effective PMO for IT	Plan, coordinate and monitor the execution of your projects in a holistic manner. Establishing a PMO will maximize the use of resources, standardize the way projects operate, and provide a holistic view of the portfolio of projects, leading to improved efficiency and a higher rate of success. http://www.infotech.com/research/establish-an-effective-pmo-for-it

	Storyboard: Establish an Effective PMO for IT	Implementing a PMO can help to ensure that resources are being used effectively, projects are completed successfully, standardized processes are being followed, and accurate information is being used for decision making. http://www.infotech.com/research/storyboard-establish-an-effective-pmo-for-it
	Level 2 Project Charter Template	A project charter organizes the project so that you can make efficient and effective resource allocation decisions. It also communicates important details about the project purpose, scope definition, and the project parameters. http://www.infotech.com/research/level-2-project-charter-template
	PMO Capability Assessment Tool	This tool will help you build a set of capabilities that together deliver the maximum value back to the organization. http://www.infotech.com/research/pmo-capability-assessment-tool
	PMO Importance Assessment Tool	While a PMO can add significant value to an organization, it's not right for every organization. This tool will help you determine if a PMO is right for you. http://www.infotech.com/research/pmo-importance-assessment-tool
	Proposed PMO Roadmap Presentation Template	Use this presentation template to obtain formal sign-off on your PMO roadmap and initiate the next steps in the process. http://www.infotech.com/research/proposed-pmo-roadmap-presentation-template
Blueprint: Evaluate and Optimize Internal Controls		
	Evaluate and Optimize Internal Controls	Compliance to external regulations and legislation is not optional. The internal control system needs to be capable of determining that the controls in place are relevant and effective in addressing new risks. http://www.infotech.com/research/evaluate-and-optimize-internal-controls
Blueprint: Develop a Knowledge Management Strategy		
	Develop a Knowledge Management Strategy	Develop a strategy and roadmap to best identify, capture and use your knowledge effectively. http://www.infotech.com/research/develop-a-knowledge-management-strategy
Blueprint: IT Governance		
	IT Governance	The IT Governance workshop has one goal: build a fit-for-purpose IT governance structure and processes to enable faster, more effective decision making and monitoring. http://www.infotech.com/research/it-governance
Blueprint: Innovation		
	Innovation	This workshop helps organizations identify areas of IT that need to innovate, structure innovative solutions, and foster collaboration, creativity, and knowledge-sharing between employees. http://www.infotech.com/research/innovation
Blueprint: IT Strategy		
	IT Strategy	This implementation blueprint will help you to understand your corporate strategy and develop an IT Strategy that meets corporate goals. http://www.infotech.com/research/it-strategy
Blueprint: Requirements Gathering		
	Requirements Gathering	This workshop will guide you through the process of developing a robust set of Standard Operating Procedures (SOPs) that specify elicitation, analysis, and validation techniques. http://www.infotech.com/research/requirements-gathering
Blueprint: Make the Case for the Hybrid IT Operating Model		

	Make the Case for the Hybrid IT Operating Model	IT continues to struggle to accommodate growing business demands within a fixed IT envelope. Most of the IT budget is allocated to maintaining status quo, which means that little is left for innovation and unexpected activities. http://www.infotech.com/research/it-make-the-case-for-the-hybrid-it-operating-model
Blueprint: Make IT a Partner in a Successful Merger or Acquisition		
	Make IT a Partner in a Successful Merger or Acquisition	IT must determine the business goals of the M&A, while also reviewing and revising its current staffing, applications, and infrastructure to address the needs of the post-merger organization. http://www.infotech.com/research/make-it-a-partner-in-a-successful-merger-or-acquisition
Blueprint: Establish an Effective IT Steering Committee		
	Establish an Effective IT Steering Committee	Many organizations contemplate forming an IT steering committee to better align IT investments with business strategy, but most don't know where to start. http://www.infotech.com/research/establish-an-effective-it-steering-committee
	Storyboard: Establish an Effective IT Steering Committee	IT steering committees are a best practice approach for aligning strategic business and IT priorities. Understand when the time is right to establish an IT steering committee and how to get this group started on the right track. http://www.infotech.com/research/storyboard-establish-an-effective-it-steering-committee
	IT Steering Committee Challenge Assessment Tool	Organizations that operate effective IT Steering Committees realize better IT project priority setting as well as improved alignment with business objectives. Use this tool to gain a better understanding of the circumstances that favor the establishment of an IT Steering Committee. http://www.infotech.com/research/it-steering-committee-challenge-assessment-tool
	Problem Management Maturity Assessment Tool	Problem management eases help desk burdens by solving end user incidents at the source. Assess the enterprise's readiness for implementation of a formal problem management program by evaluating current service desk practices. http://www.infotech.com/research/problem-management-maturity-assessment-tool
	Pareto Analysis Tool	With limited time and resources in the IT department, it is essential to identify what issues and projects should command the most attention. Use this tool to determine where the majority of challenges are rooted and save time by addressing the key issues. http://www.infotech.com/research/pareto-analysis-tool
	Fishbone Diagram	Engineers have used the "Fishbone" diagram for years to help them make decisions. Use this diagram template to apply this method to your own IT problems. http://www.infotech.com/research/fishbone-diagram
	IT Strategy Case Study of a Mid-Sized Municipal Government	The IT department of a mid-sized municipality wanted to build its strategic competency, but the team was of the habit of thinking and operating in tactical mode the majority of the time. http://www.infotech.com/research/it-strategy-case-study-of-a-mid-sized-municipal-government

	IT Strategy Case Study of a Midwestern Community College	The IT department of a multi-location community college located in the US mid-west had become siloed, operating independently from the needs of the organization it served. Many business-critical issues were not being sufficiently addressed due to poor incident response, lack of service level agreement, and ineffective handling of the project portfolio. http://www.infotech.com/research/it-strategy-case-study-of-a-midwestern-community-college
	IT Strategy Case Study of a Non-Profit Healthcare Provider	A community-based, non-profit healthcare organization has seen a rapid increase in the complexity, scope, and volume of IT services delivered over the past two years. A highly volatile political, social, and economic environment has forced the organization to rapidly adjust to new regulations, consumer needs, and skills requirements to meet project demands. http://www.infotech.com/research/it-strategy-case-study-of-a-non-profit-healthcare-provider
	IT Strategy Case Study of a Mid-Sized Health Care Organization	Performance and ability to support future growth were being challenged by an increasingly complex healthcare market and ever-tightening budgets. IT needed to chart a new course in order to successfully support the organization. http://www.infotech.com/research/it-strategy-case-study-of-a-mid-sized-health-care-organization
	IT Strategy Case Study of a Large Manufacturing Company	Increasing business complexity has been driven by both organic growth and acquisitions. IT had to align its people, projects, and resources with the Company's innovative strategy. http://www.infotech.com/research/it-it-strategy-case-study-of-a-large-manufacturing-company
	IT Steering Committee Charter	An IT Steering Committee is an excellent tool for making business accountable for the IT investment decisions it wants made. A charter is an essential document for defining the scope and purpose of this committee. Use this template to draft a committee charter. http://www.infotech.com/research/it-steering-committee-charter
	Process Profile Template	Business Process Analysis, also known as Business Process Mapping, is a systematic way of representing tasks, activities, procedures, employees, timeframes, inputs, and outputs associated with a specific business process in a flowchart-style diagram. Fundamentally, it offers a graphical representation of how an organization's processes operate. This template will assist in the gathering of information during the initial phases of the BPA process. http://www.infotech.com/research/process-profile-template
	SME IT Strategic Plan Template	This template is developed for small and mid-sized enterprises that do not have the resources to perform full IT governance to develop a complex IT strategy. This tool provides an outline that allows CIOs to develop a simple, yet effective IT strategic plan. It contains sections to document business strategy, business initiatives to support the business strategy, IT strategy to support those initiatives, and an IT strategic plan. http://www.infotech.com/research/sme-it-strategic-plan-template

	Assessing Personality Alignment	Achieving and sustaining IT/Business alignment can be elusive. The personality dimension of alignment is often overlooked by IT leaders because it is intangible and difficult to describe. Yet a personality mismatch will cause friction in the business and IT relationship and inhibit the IT organization's ability to work effectively. IT leaders should pay attention to personality to establish the right chemistry with the business. http://www.infotech.com/research/assessing-personality-alignment
	The IT/Strategy Alignment Model	Alignment of IT with business goals remains a dream in many organizations. Get started by analyzing your current business and IT structures. http://www.infotech.com/research/the-itstrategy-alignment-model
Blueprint: Prepare for a Successful IT Strategy		
	Prepare for a Successful IT Strategy	Adequate preparation for IT strategy development increases the likelihood of successful IT strategy development and execution. http://www.infotech.com/research/it-prepare-for-a-successful-it-strategy
	Storyboard: Prepare for a Successful IT Strategy	Prepare properly for successful IT strategy development, and avoid the penalties of poor pre-planning. http://www.infotech.com/research/storyboard-prepare-for-a-successful-it-strategy
	Stakeholder Analysis Table	Understand the IT strategy mandate by identifying stakeholder concerns, and mapping them to relevant IT strategy scope and appropriate detail levels. http://www.infotech.com/research/it-stakeholder-analysis-table
	Stakeholder Power Map Template	Identify and prioritize the stakeholders that are important to your IT strategy development effort. http://www.infotech.com/research/it-stakeholder-power-map-template
	IT Strategy Development Project Charter	Approach your IT strategy development effort as a project, managing the aspects of scope, time, cost, quality, human resources, risk, procurement, communications, and integration. http://www.infotech.com/research/it-it-strategy-development-project-charter
	Preparing for a Successful IT Strategy	Don't leap into developing an IT strategy without being properly prepared. http://www.infotech.com/research/it-preparing-for-a-successful-it-strategy
	Stakeholder Power Map Template	Identify and prioritize the stakeholders that are important to your IT strategy development effort. http://www.infotech.com/research/it-stakeholder-power-map-template
Vendor Landscape: Innovation Management Solutions		
	Vendor Landscape: Innovation Management Solutions	Innovation management tools can improve the idea generation and collaboration workflows in your organization. Different solutions offer varying depth across the process of innovation. http://www.infotech.com/research/it-vendor-landscape-innovation-management-solutions
	Vendor Landscape Storyboard: Innovation Management Solutions	Innovation management tools can improve the idea generation and collaboration workflows in your organization. Different solutions offer varying depth across the process of innovation. http://www.infotech.com/research/it-vendor-landscape-storyboard-innovation-management-solutions
	Innovation Management Vendor Shortlist Tool	This tool generates a shortlist of Innovation Management software providers based on necessary capabilities and requirements. http://www.infotech.com/research/it-innovation-management-vendor-shortlist-tool

Additional Resources		
	IT Templates List	This collection of IT templates is meant to help IT leaders and staff on a wide range of IT projects. These templates will help save time and ensure that template are comprehensive. http://www.infotech.com/research/it-it-templates-list
	IT Job Description List	Writing IT job descriptions can be time consuming and frustrating. Make the job easier with this list of sample IT job descriptions. http://www.infotech.com/research/it-it-job-description-list
	IT Tools List	Often times in IT useful Excel tools can be used to make better decisions and save time or money. Info-Tech has produced a useful set of IT tools in Excel to help with a wide range of IT issues. http://www.infotech.com/research/it-it-tools-list
	McLean Report: Peer Survey Results Overview April 2010	Info-Tech recently conducted several surveys for our research projects. This document is a high level summary of those results and an introduction to the resulting research. http://www.infotech.com/research/mclean-report-peer-survey-results-overview-april-2010-
	IT Steering Committee Meeting Agenda	A formal agenda prepared and distributed ahead of each meeting will help focus the efforts of the IT steering committee and keep all parties on track. Use this template to develop an IT steering committee meeting agenda. http://www.infotech.com/research/it-steering-committee-meeting-agenda
	IT Steering Committee Meeting Agenda	A formal agenda prepared and distributed ahead of each meeting will help focus the efforts of the IT steering committee and keep all parties on track. Use this template to develop an IT steering committee meeting agenda. http://www.infotech.com/research/it-steering-committee-meeting-agenda
	New IT Leaders: Engage an IT Steering Committee	IT steering committees, sometimes referred to as executive IT committees, can take a lot of pressure off new or existing IT leaders by engaging business leaders in setting IT investment priorities. Learn the lessons offered by experienced IT leaders and use the Info-Tech charter-building template to get the committee off to a strong start. http://www.infotech.com/research/new-it-leaders-engage-an-it-steering-committee
	New IT Leaders: Engage an IT Steering Committee	IT steering committees, sometimes referred to as executive IT committees, can take a lot of pressure off new or existing IT leaders by engaging business leaders in setting IT investment priorities. Learn the lessons offered by experienced IT leaders and use the Info-Tech charter-building template to get the committee off to a strong start. http://www.infotech.com/research/new-it-leaders-engage-an-it-steering-committee
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Additional Resources		
	The Rest of the Story: Contextualizing 5 Top-Level Staffing Metrics	An increasing number of IT departments are gathering metrics and building a solid history to demonstrate exactly how IT serves the business. However, sometimes that picture is not a rosy one. This note traces five top-level staffing metrics and how to fix them to ensure that the IT department is flexible, reliable, and successful. http://www.infotech.com/research/the-rest-of-the-story-contextualizing-5-top-level-staffing-metrics
	Metrics and Broccoli: You Might Not Like Them, But They're Good for You	As IT evolves, so too does the need to be proactive in measuring and controlling the quality and efficiencies of IT. Metrics are a powerful management tool that can be used to effectively communicate, maintain, and improve IT effectiveness over time. The key to a successful program is a proactive approach to metrics development. http://www.infotech.com/research/metrics-and-broccoli-you-might-not-like-them-but-theyre-good-for-you
	Metrics and Broccoli: You Might Not Like Them, But They're Good for You	As IT evolves, so too does the need to be proactive in measuring and controlling the quality and efficiencies of IT. Metrics are a powerful management tool that can be used to effectively communicate, maintain, and improve IT effectiveness over time. The key to a successful program is a proactive approach to metrics development. http://www.infotech.com/research/metrics-and-broccoli-you-might-not-like-them-but-theyre-good-for-you
	Interpreting Metrics in Business Terms	IT metrics reports that span dozens of pages and center on technology-focused metrics such as volume of mainframe batch runs, megabytes of data stored, jobs processed, or number of patches installed, will be meaningless to business leaders. If this is the current state, high-level metrics are essential. http://www.infotech.com/research/interpreting-metrics-in-business-terms
	The Rest of the Story: Contextualizing 5 Top-Level Budgeting Metrics	Gathering and analyzing key budgeting metrics allows IT to maintain a quantifiable account that shows the business how money is being invested into IT. However, sometimes interpretation of the metrics doesn't result in a rosy-colored picture that IT leaders are enthusiastic to share with the business. This note looks at ways to interpret five top-level budgeting metrics that can be better understood in order to allow the IT department to be more cost effective. http://www.infotech.com/research/the-rest-of-the-story-contextualizing-5-top-level-budgeting-metrics
	Metrics 101: Defining and Using SMART Metrics	IT metrics are defined as the measurement of activities, processes, deliverables, or resources within IT. Considering the old adage "If you can't measure it, you can't manage it", an IT metrics program is essential for understanding, managing, and improving IT operations. Start by first knowing what good metrics look like and what they do. http://www.infotech.com/research/metrics-101-defining-and-using-smart-metrics
	Metrics 101: Defining and Using SMART Metrics	IT metrics are defined as the measurement of activities, processes, deliverables, or resources within IT. Considering the old adage "If you can't measure it, you can't manage it", an IT metrics program is essential for understanding, managing, and improving IT operations. Start by first knowing what good metrics look like and what they do. http://www.infotech.com/research/metrics-101-defining-and-using-smart-metrics

Additional Resources		
	Service Catalog Software May be Overkill for Small to Mid-Size Market	IT leaders enamored with the potential benefits that could come from deploying an IT service catalog are being wooed by vendors with a variety of related software offerings. Understand both enterprise requirements and the value that a vendor solution offers when it comes to rolling out service catalogs. http://www.infotech.com/research/service-catalog-software-may-be-overkill-for-small-to-mid-size-market
	Speaking from Experience: Metrics in Government	Diligent collection and monitoring of IT metrics is crucial. Info-Tech research indicates that government agencies are ahead of the adoption curve but there is still considerable room for improvement. Learn more about implementing a successful IT metrics program and take advantage of lessons learned from experienced peers in the public sector. http://www.infotech.com/research/speaking-from-experience-metrics-in-government
	Align IT with Business Functions Using Business Activity Mapping	IT departments looking to move towards a service-oriented IT delivery model must use business activity mapping to link IT assets and services to business processes. This process helps align IT activities with business impact and paves the way for identifying the true cost of IT service. http://www.infotech.com/research/align-it-with-business-functions-using-business-activity-mapping
	IT Service Management: Is IT Delivering the Goods?	IT service management, or ITSM, has been touted as the answer to ensuring that IT is delivering business value. Despite this, Info-Tech research indicates that 65% of enterprises fall short of delivering on this important aspect of IT. http://www.infotech.com/research/it-service-management-is-it-delivering-the-goods
	Succeed in Changing Business and IT Processes	Process changes are essential and inevitable as organizations evolve and improve. However, modifying business and IT processes often seems difficult to achieve. A range of people factors conspire to derail process changes. Learn about the factors that conspire to derail process changes and understand how to overcome organizational inertia, fear, and skepticism. http://www.infotech.com/research/succeed-in-changing-business-and-it-processes
	A Business Friendly Approach to IT Service Management	IT Service Management (ITSM) has become widely recognized as a business friendly approach to delivering IT, but the complexity of frameworks, standards and best practices can sometimes have the unintended consequence of distorting the core goals of service management. Understand the principles of ITSM to prepare the enterprise for true IT service orientation. http://www.infotech.com/research/a-business-friendly-approach-to-it-service-management
	Diagnostic IT Service Management for the Framework Impaired	IT Service Management (ITSM) frameworks and standards fail to define what service orientation should look like for small and mid-sized shops. Instead of blind framework adoption, use a diagnostic approach and apply common sense to satisfy the enterprise's unique service management needs. http://www.infotech.com/research/diagnostic-it-service-management-for-the-framework-impaired

Additional Resources		
	Don't Wait for Requirements, Discover Them	Identifying requirements is an essential prerequisite to any application acquisition or development project. The typical expectation of IT analysts is that the users and stakeholders will be able to describe, completely, their requirements. However, requirements are not always obvious when an organization is seeking significant change. IT must help users visualize an improved target environment in order to develop quality requirement descriptions. http://www.infotech.com/research/dont-wait-for-requirements-discover-them
	IT Agility: Essential To Winning In A Tough Economy	(By Info-Tech Analyst Andy Woyzbun- Printed with permission from Processor magazine www.processor.com) Times are tough. Business is down. Some organizations hunker down, limiting their responses to reducing expenses and stopping projects and capital investments. They wait and hope for better times. The eventual winners, however, see the current situation as a call to action. Their leaders look to innovation in products, to expansion of channels, to more effective processes, and to expansion through acquisition as the keys to a winning strategy. http://www.infotech.com/research/it-agility-essential-to-winning-in-a-tough-economy
	Problem Management Reduces Help Desk Burdens	Problem management eases help desk burdens by solving end user incidents at the source. Assess enterprise readiness for implementation of a formal problem management program and borrow from best practice frameworks to optimize the service desk. http://www.infotech.com/research/problem-management-reduces-help-desk-burdens
	Travel the Business Process Analysis Road to Increased Value	Many businesses face challenges when creating and maintaining efficient performance management methodologies. Business Process Analysis (BPA) helps spread awareness about how a company actually carries out its objectives and may offer considerable advantages to organizations looking to increase productivity. IT managers should consider implementing BPA for improved process management in IT departments. http://www.infotech.com/research/travel-the-business-process-analysis-road-to-increased-value
	Get the Most from MOF 4.0	Microsoft shops can now refer to the Microsoft Operations Framework 4.0 (MOF) as an ITIL V.3-aligned guide to industry best practices. This fourth generation of MOF is still free and includes practical guidance on executing practices covered by ITIL. http://www.infotech.com/research/get-the-most-from-mof-40
	A Beginner's Guide to Selecting an ITIL Pilot Project	Gaining a basic, early IT Infrastructure Library (ITIL) win is a great way to get the enterprise behind IT in its effort to improve service management. Start off ITIL implementation by selecting a single process with room for improvement and enterprise-wide visibility. http://www.infotech.com/research/a-beginners-guide-to-selecting-an-itil-pilot-project
	Get to the Source of IT Problems with Pareto Analysis	The Pareto principle states that 80% of issues are derived from only 20% of the causes. Stop reactively addressing incidents as they arise. Take a proactive approach in discovering the root causes of problems by using Pareto analysis. http://www.infotech.com/research/get-to-the-source-of-it-problems-with-pareto-analysis

Additional Resources		
	Digital Signage on Tap for Retailers	The cost of digital displays is declining. However, this cost is only part of the TCO of a digital signage system. Infrastructure and content costs should be balanced with returns to justify the purchase. http://www.infotech.com/research/digital-signage-on-tap-for-retailers
	Innovative Purchasing Takes Aim at Bricks-and-Mortar Retailers	In tough economic times, the retail industry becomes even more hyper-competitive than normal. Retailers fight for every sale, and as price-conscious consumers look to online retailers for deals, bricks-and-mortar retailers are finding it increasingly difficult to win the battle for customers. Fight back with technology and transparency. http://www.infotech.com/research/innovative-purchasing-takes-aim-at-bricks-and-mortar-retailers
	Advanced SharePoint Server Features Drive Adoption in Professional Services	SharePoint adoption patterns in professional services are subtly different from other industries. Understand the trends and the direction in which they are heading to determine the potential impact of SharePoint on your firm. http://www.infotech.com/research/advanced-sharepoint-server-features-drive-adoption-in-professional-services
	Lean and Green: From the Shop Floor to the Data Center	Lean and green thinking for manufacturing should extend beyond the shop floor. Most data center operations are ripe for improvement. Applying a few green principles can minimize energy use in the data center. And it will help erase some of the red from the financial books. http://www.infotech.com/research/lean-and-green-from-the-shop-floor-to-the-data-center
	Top 10 Ways to Achieve Project Failure	Prior to embarking on new endeavors, IT leaders should be aware of the project's chances for success. Understanding how and why IT projects fail is one way to determine the outcome of a project. IT leaders who know the best ways to achieve project failure can consider the best approach to maximize their chance for success. http://www.infotech.com/research/top-10-ways-to-achieve-project-failure
	The Goal of IT/Business Alignment: Why so Elusive?	Has the ideal of IT/business alignment become the holy grail of IT leaders? The promise of IT/business alignment is to focus investment and activities, increase the value of IT, and integrate IT more closely with business initiatives. IT leaders need to look beyond the symptoms of misalignment to recognize the multiple dimensions of IT/business alignment. http://www.infotech.com/research/the-goal-of-itbusiness-alignment-why-so-elusive
	ITIL FAQs: Commonly Heard Myths	Many IT leaders are jumping on the IT Infrastructure Library (ITIL) bandwagon in an effort to increase IT service levels and decrease costs. However, many IT leaders struggle with what ITIL is all about. Info-Tech has compiled common ITIL myths to shed some light and reality on some of the most frequently misunderstood areas of ITIL. http://www.infotech.com/research/itil-faqs-commonly-heard-myths
	ITIL FAQs: Part Two	ITIL can be an overwhelming proposition for IT leaders. Those looking to adopt the IT Infrastructure Library (ITIL) frequently struggle with many questions around what ITIL is and what it can do for their organization. Use Info-Tech's series of notes on commonly asked ITIL questions to get answers and clarification. http://www.infotech.com/research/itil-faqs-part-two

Additional Resources		
	ITIL FAQs: Part One	Enterprises are jumping on the IT Infrastructure Library (ITIL) bandwagon in an effort to increase efficiency, decrease costs, and align business and IT needs. ITIL can be an overwhelming proposition for many IT leaders. Know the frequently asked ITIL questions and get the right answers before moving forward. http://www.infotech.com/research/itil-faqs-part-one

Value & Performance Research

Value & Performance: Benefits & Value Delivery

Type	Document	Description
	Get to YES Scenario & Business Case Analysis Tool	Use this tool to strategize for your advocacy situation. Reduce the cost of advocacy while improving your chances of success. http://www.infotech.com/research/it-get-to-yes-scenario-business-case-analysis-tool
Blueprint: Create a Financial Budget and Get Approval		
	Create a Financial Budget and Get Approval	A bullet-proof financial budget is constructed from a defensible projection of service and project costs. Ability to present your projections will increase your chances of getting your budget approved. http://www.infotech.com/research/create-a-financial-budget-and-get-approval
Blueprint: Improve Executive Advocacy for IT		
	Improve Executive Advocacy for IT	IT managers often need to work through an executive intermediary, such as a CFO, CIO, or VP, who acts as an advocate for IT initiatives. The advocate may not understand IT issues in depth, making it difficult for him or her to argue in favor of IT proposals. http://www.infotech.com/research/it-improve-executive-advocacy-for-it
Blueprint: Wow the CFO with an IT Budget that Demonstrates Value Delivery		
	Wow the CFO with an IT Budget that Demonstrates Value Delivery	Budgetary approval can make or break your year. A good budget proposal can get you the funding you need to meet business needs. A bad budget proposal can result in downward cost pressure that decreases service levels. http://www.infotech.com/research/wow-the-cfo-with-an-it-budget-that-demonstrates-value-delivery
	Storyboard: Wow the CFO with an IT Budget that Demonstrates Value Delivery	Budgetary approval can make or break your year. A good budget proposal can get you the funding you need to meet business needs. A bad budget proposal can result in downward cost pressure that decreases service levels. http://www.infotech.com/research/storyboard-wow-the-cfo-with-an-it-budget-that-demonstrates-value-delivery
	Cost Forecasting Tool	This tool is designed to assist in forecasting both capital and operating costs. Additionally, the tool generates diagrams that can be used in the IT Budget Presentation Template. http://www.infotech.com/research/cost-forecasting-tool
	IT Budget Presentation	This template is designed for creating an IT budget presentation initial proposal. It is intended for use at a formal budget meeting. http://www.infotech.com/research/it-budget-presentation
	Revised IT Budget Presentation	This template is designed for creating an IT budget presentation secondary proposal. It is intended for use presenting to a finance team. http://www.infotech.com/research/revised-it-budget-presentation

Blueprint: Optimize IT Decision-Making		
	Optimize IT Decision-Making	A key objective for IT management should be to establish effective decision rights for IT versus the business. Misplaced rights can create problems for IT that at the least create unnecessary work, and at worst can result in failure to deliver adequate IT services. http://www.infotech.com/research/optimize-it-decision-making
	Storyboard: Optimize IT Decision-Making	In many organizations, the allocation of IT decision rights is inappropriate, either removing from IT its rightful control of the IT technical environment, or forcing IT to make decisions that have a major impact on business units. http://www.infotech.com/research/it-storyboard-optimize-it-decision-making
	Decision Rights Gap Analysis Tool	This tool assists in identifying decision right gaps by performing a comparison between your organization's unique decision right allocation and the ideal situation. http://www.infotech.com/research/it-decision-rights-gap-analysis-tool
	IT Peer Advisory Committee Charter	Ongoing IT input provided through committees can provide continuous feedback to stakeholders who might not otherwise solicit IT's advice in decision-making. http://www.infotech.com/research/it-it-peer-advisory-committee-charter
	Optimize Decision Rights	The responsibility for IT decisions is often misplaced with those most impacted being uninvolved in decisions that they should be making. http://www.infotech.com/research/it-optimize-decision-rights

Value & Performance: Manage Budgets & Costs

Type	Document	Description
Blueprint: Consolidate Service Management to Drive IT Cost Optimization		
	Consolidate Service Management to Drive IT Cost Optimization	Cost optimization requires a holistic view of the IT service hierarchy. Optimization opportunities can be realized in three major steps: by introducing service-level tiering, by implementing a shared capacity planning process, and by consolidating vendor relationships. http://www.infotech.com/research/it-consolidate-service-management-to-drive-it-cost-optimization
	Storyboard: Consolidate Service Management to Drive IT Cost Optimization	Take cost reduction to the next level. http://www.infotech.com/research/it-storyboard-consolidate-service-management-to-drive-it-cost-optimization
	Cost Optimization User Classification Survey	Classify your users to execute service-level tiering. http://www.infotech.com/research/it-cost-optimization-user-classification-survey
	Cost Optimization Prioritization Tool	Prioritize your cost optimization opportunities within service and infrastructure. http://www.infotech.com/research/it-cost-optimization-prioritization-tool
	Cost Optimization Capacity Planning Tool	Create a shared capacity planning process across IT services. http://www.infotech.com/research/it-cost-optimization-capacity-planning-tool
	Balance Sheet Analysis Tool	Balance sheets contain valuable information on a company's profitability and financial health that an IT professional should know. Use this tool to analyze key ratios from an enterprise balance sheet, including financial strength ratios and efficiency ratios. http://www.infotech.com/research/balance-sheet-analysis-tool

Type	Document	Description
	Cost Optimization Multi-Service Vendor Shortlist Template	Record the list of vendors who can potentially provide multiple services to your organization. http://www.infotech.com/research/it-cost-optimization-multi-service-vendor-shortlist-template
	IT Cost-Cutting Tactics for Coping with a Down Economy	This is a collection of published Info-Tech research specifically designed to help IT identify areas for IT cost-cutting, along with tactics on how to achieve cost reduction targets. http://www.infotech.com/research/it-it-cost-cutting-tactics-for-coping-with-a-down-economy
	Consolidate Service Management to Optimize IT Costs	Understand how consolidated service management drives IT cost optimization. http://www.infotech.com/research/it-consolidate-service-management-to-optimize-it-costs
	Intangible Benefits Business Case Template	Just because you cannot quantify project benefits in hard numbers doesn't mean that a project is not worth pursuing. Concentrate on how your project will resolve a pressing business issue using this template. http://www.infotech.com/research/intangible-benefits-business-case
	Cost Optimization User Classification Survey	Classify your users to execute service-level tiering. http://www.infotech.com/research/it-cost-optimization-user-classification-survey
	Business Case Template	Putting together a sound business case is a pivotal step in deciding whether to make a purchase or pursue a project. Use this editable template to build a business case for any initiative. http://www.infotech.com/research/business-case-template
Blueprint: Develop Successful Strategies for Budget Planning, Proposal, and Negotiation		
	Storyboard: Develop Successful Strategies for Budget Planning, Proposal, and Negotiation	In order to obtain budgeting success, IT leaders must first calculate current costs, build accurate estimates, consider potential changes to expenses, project costs by line item, create a budget proposal, and successfully negotiate gaps imposed by the financial team. http://www.infotech.com/research/storyboard-develop-successful-strategies-for-budget-planning-proposal-and-negotiation
	IT Budget Planning Tool	It is essential for IT to have a clear understanding of current costs, projected costs, and possible contingencies required for the budget cycle. Use this tool to elicit information from business units, develop individual project budgets, develop operating and capital expenses by line item, generate and communicate at-a-glance reports, and ensure that all budgeting tasks are complete. http://www.infotech.com/research/it-budget-planning-tool
	Address Your Fears about Budget Preparation	Address your concerns about budget preparation by understanding what works and what doesn't. http://www.infotech.com/research/address-your-fears-about-budget-preparation
Blueprint: Establish a Service-Based Costing Model		
	Establish a Service-Based Costing Model	Service-based costing brings clarity to IT expenditures and visibility to IT consumption. However, overcoming the challenges of service-based costing requires a logical and systematic approach. http://www.infotech.com/research/establish-a-service-based-costing-model
	Storyboard: Establish a Service-Based Costing Model	Service-based costing brings clarity to IT expenditures and visibility to IT consumption. However, overcoming the challenges of service-based costing requires a logical and systematic approach. http://www.infotech.com/research/storyboard-establish-a-service-based-costing-model

Type	Document	Description
	Service-Based Cost Model Tool	The Service-Based Cost Model Tool is designed to identify the cost of IT department services, such as the cost of the help desk service. http://www.infotech.com/research/service-based-cost-model-tool
	Service-Based Cost Model Documentation Template	The Service Based Cost Model Documentation Template is designed for documenting the allocation methodology used in the Service-Based Cost Model Tool. http://www.infotech.com/research/service-based-cost-model-documentation-template
	Service-Based Costing Presentation	The Service-Based Costing Presentation is designed to present the costs of specific services. http://www.infotech.com/research/service-based-costing-presentation
Blueprint: Go Agile		
	Manage Uncertain Project Demand with Right-Sized Resource Agility	Project variability creates difficulty for the IT department when the organization expects quick response upon project and capital approval, but IT does not have the resources to act quickly. http://www.infotech.com/research/design-an-it-department-that-is-responsive-to-changing-business-needs
	Risk Assessment Worksheet	IT management is held accountable to determine how projects will financially impact the business and this requires hard numbers. With proper measurement, risk assessments, estimations, and assumptions it is possible to turn qualitative benefits into quantitative benefits. http://www.infotech.com/research/risk-assessment-worksheet
Blueprint: Manage Uncertain Project Demand with Right-Sized Resource Agility		
	Storyboard: Manage Uncertain Project Demand with Right-Sized Resource Agility	Organizations expect quick response upon project and capital approval, so IT resource agility must be adequate to meet project demand variability. However, care must be taken to ensure that agility is not being invested in needlessly. http://www.infotech.com/research/it-storyboard-manage-uncertain-project-demand-with-right-sized-resource-agility
	Agility Appropriateness Assessment	This tool will help to determine whether your organization's current level of resource agility is adequate given the level of project demand variability in your environment. http://www.infotech.com/research/it-agility-appropriateness-assessment
Blueprint: Use Metrics for Competitive Advantage		
	Develop Successful Strategies for Budget Planning, Proposal, and Negotiation	IT budget negotiations usually result in fewer dollars than IT leaders think they need. Preparation for negotiations is essential: a well-informed IT leader with valid reasons for budget requests is more likely to get what they need. http://www.infotech.com/research/develop-successful-strategies-for-budget-planning-proposal-and-negotiation
Additional Resources		
	Manufacturing: IT Cost Reduction Trends	Close to three-quarters of manufacturing firms are rearranging cost management priorities to meet cost reduction targets mandated by senior management. The day-to-day cost management strategies at manufacturing firms are not yet off the table. However, to succeed in reaching enterprise cost reduction goals, they are increasing their cost cutting efforts in four IT service areas: discretionary spending, staffing, application maintenance, and workstation maintenance. http://www.infotech.com/research/manufacturing-it-cost-reduction-trends

Type	Document	Description
	Professional Services: Top IT Cost Management Focus Areas	As part of IT cost management efforts, professional services industry shops focus on three IT service areas; servers and storage, application development, and discretionary spending. Info-Tech's research suggests three key strategies to prioritize in-house IT cost management efforts. Professional services enterprises should virtualize storage, use more commercial-off-the-shelf applications than custom applications, and proactively enforce policies around discretionary spending. http://www.infotech.com/research/professional-services-top-it-cost-management-focus-areas
	Drive Better Fundraising with Web 2.0 Tools	With the Internet becoming increasingly relevant in political and non-profit fund-raising, IT leaders must learn how to leverage Web 2.0 tools for maximum effectiveness. The case-study of Barack Obama's 2008 presidential campaign provides valuable lessons in the use of a Web site, e-database, social networking, and YouTube tools that helped the campaign raise half a billion dollars online. http://www.infotech.com/research/drive-better-fundraising-with-web-20-tools
	Manufacturing: Top IT Cost Management Focus Areas	As part of IT cost management efforts, manufacturing industry shops focus on three IT service areas: network and telephony, servers and storage, and discretionary and IT administrative spending. Info-Tech's research suggests three key strategies to prioritize in-house IT cost management efforts. Manufacturers should enforce policies around mobile technologies, explore server consolidation and virtualization opportunities, and centralize IT operations management. http://www.infotech.com/research/manufacturing-top-it-cost-management-focus-areas
	Wholesale/Retail: IT Cost Reduction Trends	About half of wholesale/retail firms are rearranging cost management priorities to meet cost reduction targets mandated by senior management. The day-to-day cost management strategies at wholesale/retail firms are not yet off the table. However, to succeed in reaching enterprise cost reduction goals, they are increasing their cost cutting efforts in three IT service areas: discretionary spending, application maintenance, and workstation maintenance. http://www.infotech.com/research/wholesaleretail-it-cost-reduction-trends
	Financial Services: Top IT Cost Management Focus Areas	As part of IT cost management efforts, financial services industry shops focus on three IT service areas: servers and storage, application development, and workstations. Info-Tech's research suggests three key strategies to prioritize in-house IT cost management efforts. Financial services firms should explore opportunities for server consolidation and virtualization, use more commercial-off-the-shelf applications than custom applications and standardize desktop images. http://www.infotech.com/research/financial-services-top-it-cost-management-focus-areas
	Wholesale/Retail: Top IT Cost Management Focus Areas	As part of IT cost management efforts, wholesale and retail industry shops focus on three IT service areas - network and telephony, servers and storage, and end-user support. Info-Tech's research suggests three key strategies to prioritize in-house IT cost management efforts. Wholesale and retail industry should proactively enforce policy for mobile technologies, consolidate and virtualize servers, and track all end-user support incidents. http://www.infotech.com/research/wholesaleretail-top-it-cost-management-focus-areas

Type	Document	Description
	Online Account Opening Empowers Customers, Reduces Costs	Small to mid-sized banks must look beyond their existing branch network for future growth. Online account opening capability is a critical component of capturing larger numbers of new customers in a cost effective manner. Integrate this functionality into existing systems without additional delay. http://www.infotech.com/research/online-account-opening-empowers-customers-reduces-costs

Value & Performance: Manage Business Relationships

Type	Document	Description
Blueprint: Improve IT-End User Relations		
	Improve IT-End User Relations	The nature of the end user-IT relationship has an organization-wide impact. A less than ideal relationship results in a breakdown of trust and confidence, negatively impacting IT's ability to deliver what the organization needs. http://www.infotech.com/research/it-improve-it-end-user-relations
	Storyboard: Improve IT-End User Relations	End user-IT relationships have an impact on overall workplace conditions. End-user satisfaction with IT service and communication determines the overall end user-IT relationship. Identify what relationship type you are in with the end user and take the steps to transition to the ideal state. http://www.infotech.com/research/it-storyboard-improve-it-end-user-relations
	End-User Engagement and Assessment Tool	Use this tool to reveal the areas of end-user dissatisfaction and guide you through repairing the IT-end user relationship. http://www.infotech.com/research/it-end-user-engagement-and-assessment-tool
	Boost IT-End User Relations	Info-Tech research has shown that improving end-user satisfaction with IT results in higher employee engagement, better working conditions throughout the organization, and higher employee effectiveness and productivity. http://www.infotech.com/research/it-boost-it-end-user-relations
Blueprint: Manage Stakeholder Relations		
	Manage Stakeholder Relations	Manage your stakeholders effectively by discovering who they are, understanding how they may impact you, and determining what you can do about it. http://www.infotech.com/research/manage-stakeholder-relations
	Storyboard: Manage Stakeholder Relations	Design a stakeholder management plan and a communication plan to tailor your approach for maximum success. http://www.infotech.com/research/storyboard-manage-stakeholder-relations
	Stakeholder Management Analysis Tool	A comprehensive tool that tracks identified stakeholders, analyzes them based on influence, interest, and support, and dynamically outputs a visual stakeholder map, a prioritized list, and a weighted net promoter score. http://www.infotech.com/research/stakeholder-management-analysis-tool
	Stakeholder Management Plan Template	The Stakeholder Management Plan Template tracks and organizes your strategy and tactics in working with stakeholders. http://www.infotech.com/research/stakeholder-management-plan-template
	Communication Plan Template	The Communication Plan Template is used to document and organize your strategy and tactics to effectively get your message across and to address feedback. http://www.infotech.com/research/communication-plan-template

Type	Document	Description
	Stakeholder Expectations Log	One of the worst things you can do is solicit input and then ignore it. Use this Stakeholders Expectations Log to document the details of IT stakeholder expectations so that they're not overlooked, and to refresh your memory prior to a key meeting or status reporting exercise. http://www.infotech.com/research/stakeholder-expectations-log
Blueprint: Navigate the IT Stakeholder Landscape		
	Navigate the IT Stakeholder Landscape	Many IT leaders overlook the importance of nurturing working relationships with business colleagues. http://www.infotech.com/research/navigate-the-it-stakeholder-landscape
	Advanced Business Change Description Template	To effectively communicate with staff, it is important to put the business rationale behind changes and their expectations into writing. This will be very useful when questions start to come up and the implementation begins. http://www.infotech.com/research/it-advanced-business-change-description-template
Blueprint: Prepare the Organization for IT Change		
	Storyboard: Prepare the Organization for IT Change	When it comes to enacting change, IT is its own worst enemy. They fail to address four important issues when preparing users, which ultimately results in resistance to the change. http://www.infotech.com/research/it-storyboard-prepare-the-organization-for-it-change
	Change Readiness Preparation Tool	The Change Readiness Preparation Tool evaluates IT's ability to prepare the organization for change across three key areas and provides you with detailed advice depending on your unique situation. http://www.infotech.com/research/it-change-readiness-preparation-tool
	Change Communication Plan Template	The Change Communication Plan ensures that relevant information related to an IT change is provided to all affected stakeholders and staff telling them what they need to know, when they need to know it. http://www.infotech.com/research/change-communication-plan-template
	Manage Transformational IT Change	When it comes to enacting change, IT is its own worst enemy. They fail to address four important issues when preparing users, which ultimately results in resistance to the change. http://www.infotech.com/research/it-manage-transformational-it-change

Value & Performance: Performance Measurement

Type	Document	Description
	Target Ratio, Mix, and Metric Generator	The majority of IT departments spend 66% of their time performing operational activity and 34% of their time on strategic activity. Shifting more focus to strategic activity can build competitive advantage, enable innovation, and increase key business metrics such as the revenue to IT staff ratio. http://www.infotech.com/research/it-target-ratio-mix-and-metric-generator
	Senior Management Expectation Survey	Use the following survey to evaluate senior management's expectations of IT. http://www.infotech.com/research/it-senior-management-expectation-survey
	Situation of IT Questionnaire: Are You an Innovator, Housekeeper, or Survivor?	Effective IT executives understand the role their department plays in the enterprise. Answer this questionnaire to determine if your department is an Innovator, Housekeeper, or Survivor. http://www.infotech.com/research/situation-of-it-questionnaire-are-you-an-innovator-housekeeper-or-survivor

Type	Document	Description
▶	Handling Senior Management Expectations	Often, IT makes wrong assumptions about what senior managers expect of the department and how it actually performs against those expectations. As a result, IT leaders waste time and money fixing low priority problems while ignoring the larger ones that frustrate the business. http://www.infotech.com/research/handling-senior-management-expectations
Blueprint: Use IT Metrics for Accountability and Success		
	Storyboard: IT Metrics for Accountability and Success	Info-Tech recommends that all organizations develop a metrics program, regardless of size or complexity - start with metrics that address specific business issues like spending and staffing justification or performance improvement. http://www.infotech.com/research/storyboard-it-metrics-for-accountability-and-success
	Metrics Selection and Reporting Template	All of the work that goes into selecting, collecting, and calculating IT metrics should not go unnoticed. Once the metrics have been gathered, many IT professionals face the challenge of presenting this raw data in a digestible manner. Use this template to select, enter, and track IT's key metrics in a format that can be easily communicated to all levels of the business. http://www.infotech.com/research/metrics-selection-and-reporting-template
Blueprint: Use Metrics for Competitive Advantage		
	Use IT Metrics for Accountability and Success	IT managers constantly need to justify their staffing and spending levels and strive to improve IT efficiency. http://www.infotech.com/research/it-metrics-for-accountability-and-success
	Metrics Selection and Reporting Template	All of the work that goes into selecting, collecting, and calculating IT metrics should not go unnoticed. Once the metrics have been gathered, many IT professionals face the challenge of presenting this raw data in a digestible manner. Use this template to select, enter, and track IT's key metrics in a format that can be easily communicated to all levels of the business. http://www.infotech.com/research/metrics-selection-and-reporting-template
Additional Resources		
	Make IT More Strategic by Leveraging Operational Efficiencies	IT departments that achieve their ideal mix of operational and strategic activity can advance their standing as a strategic partner in the organization. It's a matter of making IT run better so resources can be shifted to innovative and high value projects. While not an overnight process, streamlining operational IT activities will put IT on the right track to achieving strategic goals. http://www.infotech.com/research/it-make-it-more-strategic-by-leveraging-operational-efficiencies
	Best Practices for Communicating IT Metrics	All of the data that comes out of selecting, collecting, and calculating IT metrics should not be left without interpretation. Take the metric program one step further and make sure to conduct thorough analysis to properly communicate these findings outward to the business. http://www.infotech.com/research/best-practices-for-communicating-it-metrics

Value & Performance: Program & Project Management

Type	Document	Description
Blueprint: Adopt Organizational Change Management Best Practices to Maximize Project Benefits		
	Adopt Organizational Change Management Best Practices to Maximize Project Benefits	IT projects are justified because they will make you money, save you money, or make people happier, etc. Without managing organizational change, IT might get the project done but fail to achieve the intended benefits (such as productivity, revenue, cost reduction, throughput, etc.). http://www.infotech.com/research/adopt-organizational-change-management-best-practices-to-maximize-project-benefits
	Storyboard: Adopt Organizational Change Management Best Practices	Organizational change management must be embedded as a key aspect throughout the project, not merely a set of tactics added to execution. http://www.infotech.com/research/storyboard-adopt-organizational-change-management-best-practices
	Organizational Change Management Capabilities Assessment	The Organizational Change Management Capabilities Assessment is designed to evaluate your current capabilities, opportunities, and challenges around managing organizational change. http://www.infotech.com/research/organizational-change-management-capabilities-assessment
	Project Level Assessment Tool	The Project Level Assessment is a 24-question assessment that determines the risk and complexity of a project and then assigns a Level of 1, 2, or 3 to the project. http://www.infotech.com/research/project-level-assessment-tool
	Organizational Change Management Impact Analysis Tool	Info-Tech's Organizational Change Management Impact Analysis Tool helps analyze the impact of change across multiple dimensions to ensure nothing is overlooked. http://www.infotech.com/research/organizational-change-management-impact-analysis-tool
	Stakeholder Engagement Workbook	Use this Stakeholder Engagement Workbook to create a prioritized list of people who are affected or can affect your project, and to determine how best to communicate with them during the project. http://www.infotech.com/research/stakeholder-engagement-workbook
	Organizational Change Management Playbook	Use this Organizational Change Management Playbook to institute and continue to improve best practices around organizational change. http://www.infotech.com/research/organizational-change-management-playbook
	Transition Plan Template	This Transition Plan Template is designed to help you develop and document action items, communication timelines, roles and responsibilities, and other elements of the transition. http://www.infotech.com/research/transition-plan-template
	Progress Checklist â€“ Adopt Organizational Change Management Best Practices	Use this checklist as you progress through your change management plan. http://www.infotech.com/research/progress-checklist-adopt-organizational-change-management-best-practices
Blueprint: Project Management		
	Project Management	The Project Management workshop will help you to formalize a Project Management process that can be adapted based on the risk and complexity of your projects. http://www.infotech.com/research/project-management

Value & Performance: Project Portfolio Management

Type	Document	Description
Blueprint: Grow Your Own PPM Solution		
	Storyboard: Grow Your Own PPM Solution	This blueprint will help you develop an affordable, adoptable, and effective PPM solution using widely available tools, based on Info-Tech's ready-to-deploy templates. http://www.infotech.com/research/storyboard-grow-your-own-ppm-solution
	Project Portfolio Workbook	Use this workbook as a model or first iteration for your home-grown PPM solution. Follow the steps in Info-Tech's Grow Your Own PPM Solution blueprint to populate, customize, and extend this tool to suit your needs. http://www.infotech.com/research/project-portfolio-workbook
	PPM Standard Operating Procedure	Use this template to document decisions, policies, and procedures around your PPM solution. Follow the advice in Info-Tech's Grow Your Own PPM Solution blueprint to create and refine the outputs for this template. http://www.infotech.com/research/ppm-standard-operating-procedure

Value & Performance: Service Management

Type	Document	Description
	Use Case Template	A Use Case Model describes the proposed functionality of a new system. A Use Case represents a discrete unit of interaction between a user (human or machine) and the system. This interaction is a single unit of meaningful work, such as Create Account or View Account Details. http://www.infotech.com/research/use-case-template
Blueprint: Document the IT Service Catalog		
	Document the IT Service Catalog	Get to service catalog objectives faster and with less pain by selecting appropriate elements to incorporate into your service catalog project, and determining the appropriate means of service catalog publication. http://www.infotech.com/research/document-the-it-service-catalog
	Storyboard: Document the IT Service Catalog	Get to service catalog objectives faster and with less pain by selecting appropriate elements to incorporate into your service catalog project. To be effective, service catalogs must be appropriately scoped and crafted to meet pre-defined objectives and audiences. http://www.infotech.com/research/it-storyboard-document-the-it-service-catalog
	Service Catalog Mapping Tool	Service catalogs are as diverse as the organizations that use them. To be effective, service catalogs must include elements that fit the objectives that the service catalog was designed to achieve. http://www.infotech.com/research/it-service-catalog-mapping-tool
	Service Catalog Project Charter	Service catalogs are as diverse as the organizations that use them. To be effective, service catalogs must be appropriately scoped and crafted to meet predefined objectives and audiences. http://www.infotech.com/research/it-service-catalog-project-charter
	Service Catalog Template	Service catalogs are as diverse as the organizations that use them. To be effective service catalogs must be appropriately scoped and crafted to meet predefined objectives and audiences. Use this template to document the IT service catalog. http://www.infotech.com/research/it-service-catalog-template

Blueprint: Enhance Business Value through Customer-Centric IT Service Management		
	Enhance Business Value through Customer-Centric IT Service Management	IT's customers are more demanding and knowledgeable about technology, and there is less tolerance for poor IT service now than ever before. A change in Information Technology Service Management (ITSM) philosophy is required to keep up with the changing business landscape. http://www.infotech.com/research/it-enhance-business-value-through-customer-centric-it-service-management
	Storyboard: Enhance Business Value through Customer-Centric IT Service Management	Info-Tech recognizes the need for a customer focused business model and recommends the adoption of ITSM 2.0 which views every decision and action through the lens of the customer experience. http://www.infotech.com/research/it-storyboard-enhance-business-value-through-customer-centric-it-service-management
	ITSM Self-Assessment Tool	Use this tool to dictate which research to focus on in the ITSM Solution Set Roadmap. http://www.infotech.com/research/it-itsm-self-assessment-tool
	Stakeholder Analysis Tool	Use this tool to help you map concerns to the relevant stakeholders, and plan IT department effort. http://www.infotech.com/research/it-stakeholder-analysis-tool
	Core Competency Framework and Mapping Tool	Use this tool to develop your IT department's core competency framework. It will help you identify strengths and weaknesses of your IT staff. It will also help you recognize which employees are most suited for customer-facing roles or for problem management. http://www.infotech.com/research/it-core-competency-framework-and-mapping-tool
	Change Description Form	Use this template to outline the details of a major departmental or organizational change. http://www.infotech.com/research/it-change-description-form
Blueprint: Establish a Right-Sized Incident Management Process		
	Establish a Right-Sized Incident Management Process	Poor treatment of incidents can undermine the functionality of your IT services and prolong the time and impact of service disruptions. Prevent this issue by developing a right-sized Incident Management process that enables faster, better quality, and lower cost incident resolutions. http://www.infotech.com/research/establish-a-right-sized-incident-management-process
	Storyboard: Establish a Right-Sized Incident Management Process	Implementing a right-sized Incident Management process is critical to your IT department's ability to resolve service issues. http://www.infotech.com/research/storyboard-establish-a-right-sized-incident-management-process
	Incident Management Gap Analysis Tool	The Incident Management Gap Analysis Tool is designed to help you identify the level of investment that best fits your organization's Incident Management process goals. The results from this tool will help assist you in identifying critical investments and process improvements. Allow this tool to support your Incident Management project plan and develop a right-sized process that manages incidents from intake to resolution. http://www.infotech.com/research/incident-management-gap-analysis-tool
	Incident Management Maturity Assessment Tool	The Incident Management Maturity Assessment Tool will measure your organization's current process maturity and level of adherence. Use these results to identify underperforming process areas and develop process improvement plans that will increase total process maturity and adherence. http://www.infotech.com/research/incident-management-maturity-assessment-tool

	Incident Management Standard Operating Procedure	The Incident Management Operating Procedure Template should be used as a framework to support your organization's establishment and documentation of a formal Incident Management process. http://www.infotech.com/research/incident-management-standard-operating-procedure
	Incident Management Metrics Tool	The Incident Management Metrics Tool should be used to monitor key performance indicators and report the success of your Incident Management to stakeholders. http://www.infotech.com/research/incident-management-metrics-tool
Blueprint: Improve the Service Orientation of IT Staff		
	Improve the Service Orientation of IT Staff	It is crucial that the IT department demonstrate a customer-oriented mindset because such a culture brings numerous benefits to IT and the business. This solution set will help you assess the level of customer service orientation and provide advice on how to bridge any gaps. http://www.infotech.com/research/it-improve-the-service-orientation-of-it-staff
	Storyboard: Improve the Service Orientation of IT Staff	A customer-oriented IT department reduces department costs, improves the quality of deliverables, and boosts the efficiency of the IT workforce. This storyboard helps you assess the level of customer service orientation in your IT department, and provides advice on how to further improve its service orientation. http://www.infotech.com/research/it-storyboard-improve-the-service-orientation-of-it-staff
	IT Customer Service Orientation Assessment Tool	A customer-oriented IT department reduces department costs, improves the quality of deliverables, and boosts the efficiency of the IT workforce. There are six core competencies that are essential to service orientation in IT. Facilitate these competencies to see clear benefits to the organization, the team, and for individuals. http://www.infotech.com/research/it-it-customer-service-orientation-assessment-tool
Blueprint: Make IT More Responsive & Agile		
	Make IT More Responsive & Agile	The need for responsiveness is not always driven by a need for speed. Improvements to revenue generation, customer satisfaction, quality, and availability are also drivers. http://www.infotech.com/research/it-make-it-more-responsive-agile
	Storyboard: Make IT More Responsive & Agile	IT's traditional approach to doing projects and providing services tend to be cautious, controlled and thorough--for good reason--but not perceived to be in touch with this rapid-fire business environment. New, more agile methods need to be utilized. http://www.infotech.com/research/it-storyboard-make-it-more-responsive-agile
	Agile Sprint Planning Workbook	This workbook enables the Scrum Master to maintain a record of all key information about an Agile project. http://www.infotech.com/research/it-agile-sprint-planning-workbook
	IT Responsiveness Assessment	The IT Responsiveness Assessment tool assists IT organizations with determining where they can be more responsive and it provides advice for how on how to improve. http://www.infotech.com/research/it-it-responsiveness-assessment

	Agile Software Development Process Guide	This template provides an overview of the agile software development process, including a checklist guide for executing the process steps and the roles involved. http://www.infotech.com/research/it-agile-software-development-process-guide
	Meet Business Demands with Refined Responsiveness & Agility	IT leaders are challenged with meeting business needs due to rapid change or growth, while effectively maintaining and improving essential IT services. http://www.infotech.com/research/it-meet-business-demands-with-refined-responsiveness-agility
Blueprint: Incident and Problem Management		
	Incident and Problem Management	Successfully building and implementing right-sized Incident and Problem Management processes will allow you to improve the quality of your service support by improving resolution times and decrease incident recurrences. http://www.infotech.com/research/incident-and-problem-management
Blueprint: Service Management		
	Service Management	Our Service Management research has one goal: Provide clear, measurable improvements to your current Service Management processes. http://www.infotech.com/research/it-service-management
Blueprint: Govern Shared Services		
	Govern Shared Services	IT managers have come under increasing pressure to cut costs, and implementing shared services has become a popular demand from the business. http://www.infotech.com/research/it-govern-shared-services
	Storyboard: Govern Shared Services	Organizations pursue shared services to reduce costs and increase quality. However, ineffective governance frequently undermines the benefits of shared services, with over a third of implementations increasing costs. http://www.infotech.com/research/it-storyboard-govern-shared-services
	The Who, Why and How of Government SOA	Government IT leaders are faced with a multitude of challenges to achieve IT agility that leads to business agility. Many are turning to or considering Service Oriented Architecture (SOA) to help meet this challenge. Info-Tech Research Group ran a survey in the spring of 2007. The presentation explores the results of the survey as it applies to governments and how government compares to other industries. http://www.infotech.com/research/the-who-why-and-how-of-government-soa
	Shared Services Governance Strategy Roadmap Tool	Use this tool to pick the optimal governance model for your organizational scenario and follow the appropriate steps to get the implementation launched. http://www.infotech.com/research/it-shared-services-governance-strategy-roadmap-tool
	Communications Plan Template	A communications plan is used to make sure that current information - for example, updating policies and procedures - is provided in an effective manner to all pertinent internal and external parties. Use this template to plan out and promote effective enterprise communication. Modify this template to suit enterprise needs. http://www.infotech.com/research/communications-plan-template
	Use Case Template	A Use Case Model describes the proposed functionality of a new system. A Use Case represents a discrete unit of interaction between a user (human or machine) and the system. This interaction is a single unit of meaningful work, such as Create Account or View Account Details. http://www.infotech.com/research/use-case-template

▶	Governing Shared Services	Organizations pursue shared services to reduce costs and increase quality. However, ineffective governance frequently undermines the benefits of shared services, with over a third of implementations increasing costs. This video will discuss three governance models for shared services. http://www.infotech.com/research/it-governing-shared-services

Value & Performance: Vendor Management

Type	Document	Description
	Request for Information Template	Use this template for issuing a Request for Information (RFI). http://www.infotech.com/research/request-for-information-template
Blueprint: Develop a Cloud Consumption Strategy		
	Develop a Cloud Consumption Strategy	Cloud computing has opened doors for failure in planning and managing for IT services. Organizations must put the appropriate planning, managing, and accounting measures in place to control cloud costs, and ensure that IT services are not over or under-consuming IT resources. http://www.infotech.com/research/it-develop-a-cloud-consumption-strategy
	Storyboard: Develop a Cloud Consumption Strategy	Cloud computing has opened doors for failure in planning and managing for IT services. Because anyone with a credit card can potentially provision more capacity, organizations must put the appropriate measures in place to control cloud costs, and ensure that employees are not over or under-consuming IT resources. http://www.infotech.com/research/it-storyboard-develop-a-cloud-consumption-strategy
	Cloud Consumption Strategy Appropriateness Assessment	The appropriate strategies for optimizing cloud consumption need to be put in place, but some organizations are more positioned to take immediate advantage of certain planning, managing, or accounting techniques than others. Use this tool to determine, based on your answers to a short survey, what your organization should be doing to optimize cloud consumption. http://www.infotech.com/research/it-cloud-consumption-strategy-appropriateness-assessment
▶	Video: Develop a Cloud Consumption Strategy	Cloud computing has opened doors for failure in planning and managing for IT services. Because anyone with a credit card can potentially provision more capacity, organizations must put the appropriate measures in place to control cloud costs, and ensure that employees are not over or under-consuming IT resources. http://www.infotech.com/research/it-video-develop-a-cloud-consumption-strategy
Blueprint: Effectively Manage Cloud Vendors		
	Effectively Manage Cloud Vendors	There are many vendor management lessons learned from early adopters. Take advantage of their experience to sidestep unnecessary aggravation. http://www.infotech.com/research/it-effectively-manage-outsourcers-cloud-vendors
	Storyboard: Effectively Manage Cloud Vendors	As cloud services become more prevalent, cloud customers need to learn to effectively manage their numerous new relationships with cloud service providers. This solution set instructs readers on the key differences between cloud and traditional vendor management. http://www.infotech.com/research/it-storyboard-effectively-manage-cloud-vendors

Type	Document	Description
	Effectively Manage Cloud Vendors Checklist	As cloud services become more prevalent, cloud customers need to learn to effectively manage their numerous new relationships with cloud service providers. This checklist helps users quickly assess the effectiveness of their vendor management. http://www.infotech.com/research/it-effectively-manage-cloud-vendors-checklist
	Effectively Manage Cloud Vendors - Video	As cloud services become more prevalent, cloud customers need to learn to effectively manage their numerous new relationships with cloud service providers. This solution set instructs readers on the key differences between cloud and traditional vendor management. http://www.infotech.com/research/it-effectively-manage-cloud-vendors-video
Blueprint: Get Ready for Application Development Outsourcing		
	Get Ready for Application Development Outsourcing	Many organizations enter into outsourcing arrangements without understanding the inherent risks and the internal changes they will need to make to their own staffing, infrastructure, and policies to support the outsourced projects and keep them under control. http://www.infotech.com/research/evaluate-outsourcing-as-an-option
	Storyboard: Get Ready for Application Development Outsourcing	Organizations need to do their homework before the application outsourcing engagement begins. This involves picking the right application to outsource, choosing a suitable outsourcer to perform the work, and planning a proper negotiation strategy to build a solid contract. Once the engagement has begun, the project will need to be monitored to ensure that it is progressing as planned. Outsourcing application development does not mean the organization has freed itself of work, it just means the organization will be doing a different sort of work. http://www.infotech.com/research/storyboard-get-ready-for-application-development-outsourcing
	Application Development Outsourcing Contract Risk Assessment	Application development outsourcing initiative success depends greatly on a thorough contract. While it does not have to be overly complex and laboriously constructed to be sound, the contract must systematically cover all aspects of a project (the financial component, quality standards, timelines, etc.). Before your organization builds its outsourcing contract, make sure you decide the main points that must be included. http://www.infotech.com/research/application-development-outsourcing-contract-risk-assessment
	Application Development Outsourcing Performance Metrics Tracking Tool	Out of sight should not mean out of mind when it comes to application development outsourcing projects. The work may be performed offsite, but the organization's IT department must regularly record and review the progress. That way, when problems or misunderstandings arise, as they inevitably will, your organization will be there to direct the project back on track. http://www.infotech.com/research/application-development-outsourcing-performance-metrics-tracking-tool
	Application Development Outsourcing Success Estimation Tool	Application development outsourcing can be a risky process if organizations approach it unprepared. Examine organizational needs and the details of the outsourcing initiative to determine potential successes and challenges. Then decide if the project will add value and form appropriate risk mitigation strategies. http://www.infotech.com/research/application-development-outsourcing-success-estimation-tool

Type	Document	Description
▶	Application Development Outsourcing: Getting Ready	Application development outsourcing offers organizations potential cost benefits, an expansion of IT skills, and a higher level of flexibility with IT resourcing. However, outsourcing projects commonly run over budget, fall off-schedule, or deliver poor quality if the project is not properly prepared for and managed. http://www.infotech.com/research/application-development-outsourcing-getting-ready
🔍	Vendor Management Case Study of a Mid-Sized Electric Utility	A 13-person IT department in a small, regional, non-profit electric generation and transportation utility located in the eastern US managed over 50 vendors. While no major problems existed, the small team's reliance on vendor support to deliver IT services demanded better vendor management process standardization in order to optimize the vendor portfolio and manage risk. http://www.infotech.com/research/vendor-management-case-study-of-a-mid-sized-electric-utility
🔍	Vendor Management Case Study of a Regional Grocery Chain	A lack of standardized vendor management process inhibited a grocery retailer from optimizing the value of its IT vendor portfolio and effectively managing risk in certain situations. To solve the problem, they targeted a moderate-to-high level of maturity to gain effectiveness while limiting unnecessary tasks that would slow efficiency. http://www.infotech.com/research/vendor-management-case-study-of-a-regional-grocery-chain
Blueprint: Get Ready for the Evolution of Vendor Management		
⚙	Get Ready for the Evolution of Vendor Management	Vendor management (VM) will evolve to become an integral component of IT operations and will be a priority for IT leaders in the short- and long-term future. Understand the trends that will shape VM to prepare your organization's VM function for the short and long term. http://www.infotech.com/research/get-ready-for-the-evolution-of-vendor-management
📄	Storyboard: Get Ready for the Evolution of Vendor Management	Understanding the trends that are shaping vendor management is the first step to preparing your organization's VM function for the future. http://www.infotech.com/research/it-storyboard-get-ready-for-the-evolution-of-vendor-management
🔧	Vendor Management Capability Assessment and Planning Tool	Self-assess the current state of your vendor management (VM) function to help plan steps to improve your VM capability. http://www.infotech.com/research/it-vendor-management-capability-assessment-and-planning-tool
🔧	Vendor Management Skills Inventory Tool	Vendor management (VM) skills will be in high demand in the future. Knowing what skills your team has and where the gaps are is crucial to planning for your VM function. http://www.infotech.com/research/it-vendor-management-skills-inventory-tool
🔧	Vendor Heat Map	Not all vendors should receive equal attention. Vendor segmentation allows you to identify the ones that should get the most attention and spend the appropriate amount of effort and time managing those relationships. Use this Vendor Heat Map to segment your vendor portfolio. http://www.infotech.com/research/it-vendor-heat-map

Type	Document	Description
	Vendor Management Standard Operating Procedures	Creating and publishing standard operating procedures (SOP) are a key step to improving vendor management (VM) capability. This provides a description of all VM processes and also acts as a guide for employees to follow when completing VM processes. http://www.infotech.com/research/it-vendor-management-standard-operating-procedures
	Vendor Management Capability Metric Definition Template	In order to measure the performance of the vendor management (VM) function, VM metrics first need to be defined. http://www.infotech.com/research/it-vendor-management-capability-metric-definition-template
	IT Sourcing Policy	Sourcing governance is a key step in vendor management and is often communicated and enforced through the use of an IT Sourcing Policy. Use this as a starting point to creating and implementing sourcing governance at your organization. http://www.infotech.com/research/it-it-sourcing-policy
	Vendor Management Work Product Templates	This package consists of tools and templates that can help standardize your vendor management work products. http://www.infotech.com/research/it-vendor-management-work-product-templates
Blueprint: Improve Accountability for Vendor Management Excellence		
	Improve Accountability for Vendor Management Excellence	Rather than simply focusing on procurements, IT organizations must shift their positioning to be relationship strategists when dealing with vendors. Doing so will maximize the value resulting from vendor partnerships. http://www.infotech.com/research/it-improve-accountability-for-vendor-management-excellence
	Storyboard: Improve Accountability for Vendor Management Excellence	Master current vendor management practices and take next steps towards more advanced capability with the right people on the team. http://www.infotech.com/research/it-storyboard-improve-accountability-for-vendor-management-excellence
	Performance Metrics Tracking Tool	Actively monitoring performance levels is a beneficial practice. It allows you to be fully aware whether vendors are meeting contract agreements, and remedy any issues as they arise, rather than letting undetected problems persist. http://www.infotech.com/research/performance-metrics-tracking-tool
	Key Vendor List	The Key Vendor List is for keeping track of vital vendor relationships. Use it to document all vendors providing products and services to IT, and the individual responsible for maintaining each vendor relationship. http://www.infotech.com/research/it-key-vendor-list
	RFP Response Evaluation Tool	The RFP Response Evaluation Tool provides a framework for grading proposals against appropriate selection criteria, and reaching a rational decision as to the best proposals. http://www.infotech.com/research/it-rfp-response-evaluation-tool
	Vendor Management Capability Assessment Tool	Use this tool to measure your current level of capability in the five management areas that encompass vendor management. These management areas include: identify and evaluate vendors, select vendors, manage vendor relationships and contracts, manage vendor risk, and monitor vendor performance. http://www.infotech.com/research/it-vendor-management-capability-assessment-tool

Type	Document	Description
	Contract Risk Assessment Tool	Some contractual items up for negotiation present more risk to the enterprise than others. Prior to setting a negotiation plan, it's worthwhile to evaluate each negotiable item to understand its importance, the impact of vendor failure to deliver, and the overall probability of failure. http://www.infotech.com/research/contract-risk-assessment-tool
	Contract Negotiation Plan	The goal of this tool is to help prioritize the main areas that must be addressed during negotiations, understand the risks, and identify walk-away values. http://www.infotech.com/research/contract-negotiation-plan
	Contract Negotiation Team Rules of Engagement Checklist	The Contract Negotiation Rules of Engagement Checklist describes rules of conduct that can help focus the team on a common goal. http://www.infotech.com/research/it-contract-negotiation-team-rules-of-engagement-checklist
	Performance Metrics Guide	The Performance Metrics Guide suggests the types of targets and measurements that are appropriate for various types of vendor services. http://www.infotech.com/research/it-performance-metrics-guide
	Contract Negotiation Team Selection Template	Successful negotiations hinge on the careful development and execution of a clear negotiation strategy. http://www.infotech.com/research/it-contract-negotiation-team-selection-template
	Escalation List Template	When vendor expectations are not met, the enterprise must take steps to remedy the situation. In such cases, there must be a clear line of communication between the enterprise and the vendor. http://www.infotech.com/research/escalation-list-template
	Request for Proposal Template	A Request for Proposal (RFP) is a formal invitation issued by a business or agency requesting interested vendors to submit written proposals meeting a particular set of requirements. http://www.infotech.com/research/request-for-proposal-template
	Maximizing Vendor Performance	Improve IT excellence by improving the performance of your vendors. http://www.infotech.com/research/maximizing-vendor-performance
Blueprint: Vendor Management		
	Vendor Management	Our Vendor Management Research has one goal: Provide clear, measurable improvements to your current Vendor Management Process. http://www.infotech.com/research/vendor-management
Blueprint: Optimize IT Procurement		
	Optimize IT Procurement	Configure your IT procurement process for each major purchase to maximize procurement value and minimize time to acquisition. http://www.infotech.com/research/optimize-it-procurement
	Storyboard: Optimize IT Procurement	Configure your IT procurement process uniquely for each procurement to buy quickly and effectively. Then make the execution excellent and auditable. http://www.infotech.com/research/storyboard-optimize-it-procurement
	Procurement Process Configuration Tool	This tool creates a configured procurement process for each specific procurement. http://www.infotech.com/research/procurement-process-configuration-tool
	Proposal Evaluation Tool	This tool scores vendor proposals against weighted criteria and provides a vendor recommendation. http://www.infotech.com/research/proposal-evaluation-tool

Type	Document	Description
	Vendor Pricing Tool	When comparing the total cost of ownership of each vendor's price proposal, knowing the breakdown of each component of the total price is crucial. Provide vendors with a standard pricing form that breaks out the total cost of their offering to the component level. http://www.infotech.com/research/vendor-pricing-tool
	Vendor TCO Tool	Up-front price is not the same as the solution cost; you must consider the Total Cost of Ownership (TCO). TCO covers all stages of the solution lifecycle from planning and acquisition, to use and disposal. You may find that you are paying more up-front to save costs later (or vice versa). http://www.infotech.com/research/vendor-tco-tool
	Modal Scoring Tool	Modal scoring facilitates the scoring process when it involves a high number of evaluators. It allows for discussion about the final score and forces consensus decision-making. http://www.infotech.com/research/modal-scoring-tool
	Optimize IT Procurement Readiness Checklist	Check that you have everything in place to start procurement. http://www.infotech.com/research/optimize-it-procurement-readiness-checklist
	Procurement Team List Template	This template organizes information about the different teams required for procurement. http://www.infotech.com/research/procurement-team-list-template
	Vendor Response Template	Use the template to receive proposals that reflect the problem at hand. Request an appropriate level of detail for your specific procurement. http://www.infotech.com/research/vendor-response-template
	Scenario Template	Vendor demonstrations will prove that vendors can deliver on their promises. Provide vendors with a specific, straightforward explanation of what they must show during the demo. http://www.infotech.com/research/scenario-template
	Sample Reference Check Questions	Plan ahead when interviewing a vendor's references. Determine the suitability of the vendor by asking the right questions of its previous clients. http://www.infotech.com/research/sample-reference-check-questions
	Evaluator's Guidebook	All evaluators must understand the evaluation framework and compare proposals against predefined criteria. Distribute the Evaluator's Guidebook to all team members to ensure consistency and reduce stakeholder bias. http://www.infotech.com/research/evaluator-s-guidebook
	IT Procurement Presentation Template	Help executives understand your vendor selection recommendation by explaining the decision rationale in business terms. http://www.infotech.com/research/it-procurement-presentation-template
	IT Procurement Glossary	Use this glossary to identify and define terms that occur within procurement documents. http://www.infotech.com/research/it-procurement-glossary
	Request for Proposal (RFP) Template	Use this template to issue a Request for Proposal. http://www.infotech.com/research/request-for-proposal-rfp-template
	Request for Quotation Template	Use this template to issue a Request for Quotation. http://www.infotech.com/research/request-for-quotation-template
	Request for Information Template	Use this template for issuing a Request for Information (RFI). http://www.infotech.com/research/request-for-information-template

Additional Resources		
	Vendor Management SOP for a Mid-sized Food Retail Company	This document defines a set of Standard Operating Procedures (SOP) for running the Vendor Management function for a mid-sized food retail company. http://www.infotech.com/research/it-vendor-management-sop-for-a-mid-sized-food-retail-company
	Contracting for Technology Projects in the Public Sector: Drafting a Suitable RFP	Complex technology projects in the public sector are difficult to complete without setbacks. A necessary condition for project success is a thorough contracting process that defines objectives, rewards, and penalties for both parties of the contract. Draft a detailed RFP to shorten the negotiation process and minimize extra project expenses. http://www.infotech.com/research/contracting-for-technology-projects-in-the-public-sector-drafting-a-suitable-rfp
	Manufacturing: The ZigBee Buzz Is Growing Louder	ZigBee is an innovative wireless protocol with benefits for managing industrial facilities and processes. Investigate energy management and building automation applications to see if ZigBee technology can help reduce costs. http://www.infotech.com/research/manufacturing-the-zigbee-buzz-is-growing-louder
	Professional Services: Benefits and Challenges of Application Outsourcing	Professional services firms report greater resource availability and improved deliverable quality from outsourcing enterprise software. Learn how others in the industry are benefiting from application outsourcing, and prevent the most common problems before they arise. http://www.infotech.com/research/professional-services-benefits-and-challenges-of-application-outsourcing
	Crafting the RFP for Enterprise Applications	The Request for Proposal (RFP) is a crucial input when selecting an enterprise application such as Enterprise Resource Planning (ERP) or Customer Relationship Management (CRM). Use Info-Tech's recommendations to avoid the most common pitfalls of crafting an RFP. http://www.infotech.com/research/crafting-the-rfp-for-enterprise-applications
	Selecting the Right Radiology Information System	Hospitals should focus on commercial Radiology Information Systems (RIS), given their affordability and maturity, rather than develop one from scratch. Use Info-Tech's evaluation criteria to select the right RIS. http://www.infotech.com/research/selecting-the-right-radiology-information-system

Management & Leadership Research

Attract & Select Research

Attract & Select: Assessment & Selection

Type	Document	Description
	Pre-interview Guide for Interviewers	The Pre-interview Guide for Interviewers template ensures interviewers are organized and conduct consistent interviews. It provides a checklist of key activities to complete before the interview, a summary of interview process steps, and information about red and yellow flags. http://www.infotech.com/research/pre-interview-guide-for-interviewers
	Screening Interview Template	Use this template to conduct telephone screening interviews and identify qualified candidates for in-person interviews. http://www.infotech.com/research/screening-interview-template
	Interview Guide Template	Use this template to conduct telephone screening interviews and identify qualified candidates for in-person interviews. http://www.infotech.com/research/interview-guide-template
	Supplement: Quick Fixes to Common Interview Errors	Advance preparation is highly recommended before you conduct any candidate interview. The "Quick Fixes to Common Interview Errors" supplement is a hand-out that can be easily and quickly scanned right before conducting an interview. http://www.infotech.com/research/supplement-quick-fixes-to-common-interview-errors
	Candidate Communication Template	Use this template as a script for different candidate communication scenarios. http://www.infotech.com/research/candidate-communication-template
Acquire the Right Hire with Effective Interviewing		
	Storyboard: Acquire the Right Hires with Effective Interviewing	Effectively interviewing candidates to hire the best people should be a top priority for every organization. Use this Storyboard to acquire the right hire by developing a proper interview strategy, preparing interviewers, and continuously evaluating your organization's interview process. http://www.infotech.com/research/storyboard-acquire-the-right-hires-with-effective-interviewing
	Candidate Interview Strategy and Planning Guide	An effective interview process requires a documented strategy and plan that involves all organizational stakeholders. Use this tool to capture essential information for an effective interview process. http://www.infotech.com/research/candidate-interview-strategy-and-planning-guide
	Pre-interview Guide for Interviewers	The Pre-interview Guide for Interviewers template ensures interviewers are organized and conduct consistent interviews. It provides a checklist of key activities to complete before the interview, a summary of interview process steps, and information about red and yellow flags. http://www.infotech.com/research/pre-interview-guide-for-interviewers
	Screening Interview Template	Use this template to conduct telephone screening interviews and identify qualified candidates for in-person interviews. http://www.infotech.com/research/screening-interview-template
	Interview Guide Template	Use this template to conduct telephone screening interviews and identify qualified candidates for in-person interviews. http://www.infotech.com/research/interview-guide-template

Type	Document	Description
	Supplement: Quick Fixes to Common Interview Errors	Advance preparation is highly recommended before you conduct any candidate interview. The "Quick Fixes to Common Interview Errors" supplement is a hand-out that can be easily and quickly scanned right before conducting an interview. http://www.infotech.com/research/supplement-quick-fixes-to-common-interview-errors
	Candidate Communication Template	Use this template as a script for different candidate communication scenarios. http://www.infotech.com/research/candidate-communication-template
Improve Hiring Decision Success		
	Improve Hiring Decision Success	A bad hire can cost organizations up to 15 times an employee's annual salary and can also lead to damaged employee morale, discontinuity in production, and a poor company reputation. http://www.infotech.com/research/improve-hiring-decision-success
	Storyboard: Improve Hiring Decision Success	Use this storyboard to learn the key practices and processes that will help managers make better hiring decisions. http://www.infotech.com/research/storyboard-improve-hiring-decision-success
	Hiring Decision Guide	Use this tool to track, document, and organize information that is needed to make effective hiring decisions. http://www.infotech.com/research/hiring-decision-guide

Attract & Select: Sourcing & Screening

Type	Document	Description
Acquire Talent as a Hiring Manager		
	Acquire Talent as a Hiring Manager	Hiring managers seldom ask HR for guidance on the recruitment process because they think they are capable and know how to hire. As a result, they rely on their own knowledge and experience, which can lead to poor processes that are ineffective at acquiring good talent. http://www.infotech.com/research/acquire-talent-as-a-hiring-manager
	Storyboard: Acquire Talent as a Hiring Manager	In order to get positive results from the recruitment and selection process, ensure you know about best practices for putting the process into day-to-day practice. http://www.infotech.com/research/storyboard-acquire-talent-as-a-hiring-manager
	Recruitment Source Identification Tool and Database	Use this Recruitment Source Identification Tool and Database to identify recruiting sources that will help you find the talent you want based on your organization's hiring needs and recruitment budget. http://www.infotech.com/research/recruitment-source-identification-tool-and-database
	Hiring Policy	The hiring process is a potential employee's first exposure to your organization. The efficiency and quality of that process will permanently influence how they view the organization and whether or not they take the job. http://www.infotech.com/research/hiring-policy
	Reference Check Interview Template	Use this template as the basis for a call script when checking a candidate's references. It can also be used as documentation to record answers and information acquired. http://www.infotech.com/research/reference-check-interview-template

Type	Document	Description
	Job Offer Letter Template	Use the Job Offer Letter Template to give you a starting point to draft your own job offers, and to ensure that all relevant information is included. http://www.infotech.com/research/job-offer-letter-template
Design a Pre-Hire Test to Select the Best		
	Design a Pre-Hire Test to Select the Best	Finding and hiring the best talent is still a major challenge for most organizations; pre-hire testing has returned to popularity in recent times. Competency-based pre-hire testing as a part of a comprehensive selection process can improve the chances of hiring the best candidate by ensuring the right set of competencies to serve in the role. http://www.infotech.com/research/design-a-pre-hire-test-to-select-the-best
	Storyboard: Design a Pre-Hire Test to Select the Best	Hiring quality talent is still a major challenge for many organizations; pre-hire testing candidates the right way means more data to make the best selection. http://www.infotech.com/research/storyboard-design-a-pre-hire-test-to-select-the-best
	Design a Pre-Hire Test Workbook	This tool will help you organize the information required to design or select a pre-hire test that best suits the job role/group that you want to evaluate. http://www.infotech.com/research/design-a-pre-hire-test-workbook
	Ideal Candidate Profile Tool	The Ideal Candidate Profile Tool allows hiring managers to identify and evaluate the importance of attributes that an ideal candidate for a particular position should possess in order to be successful on the job. http://www.infotech.com/research/ideal-candidate-profile-tool
Leverage the First 100 Days as a New Leader		
	Leverage the First 100 Days as a New Leader	Over 50% of new leaders fail within the first 18 months of their assignment. Neglecting to leverage the first 100 days on the job is significantly linked to not meeting leadership expectations. http://www.infotech.com/research/leverage-the-first-100-days-as-a-new-leader
	Storyboard: Leverage the First 100 Days as a New Leader	Organize the first 100 days on the job into manageable 30-40 day chunks with time focused goals to help you achieve success in the short and long-term. http://www.infotech.com/research/storyboard-leverage-the-first-100-days-as-a-new-leader
	STOP, START, CONTINUE Team Assessment Template	Knowing what the team should stop, start, and continue is a succinct way to glean insights from your early days as a new leader. http://www.infotech.com/research/stop-start-continue-team-assessment-template
	New Leader SWOT Analysis Template	A SWOT analysis is one of the most common and applicable frameworks for examining a situation. New leaders must conduct a SWOT analysis within their first 100 days on the job to inform business and strategic planning initiatives. http://www.infotech.com/research/new-leader-swot-analysis-template
	New Leader Business Strategy and Planning Template	New leaders must begin creating a well-informed strategy within the first 100 days on the job. It is essential to document this strategy and plan in order to consult stakeholders and gain buy-in. http://www.infotech.com/research/new-leader-business-strategy-and-planning-template
	STOP, START, CONTINUE 360 Review New Leader Evaluation Form	Collecting feedback from staff members and your manager is an excellent way to understand their perceptions and ideas for improvement. Gaining your team's feedback in the first 100 days can set you up for improved success in the long-term. http://www.infotech.com/research/stop-start-continue-360-review-new-leader-evaluation-form

Type	Document	Description
Additional Resources		
	Job Posting Template	Space is often limited and expensive, so a clear and concise job posting that attracts the right applicants the first time around is critical for keeping costs reasonable. This tool is designed to help draft a successful IT job posting for placement in print or online media. http://www.infotech.com/research/job-posting-template

Engage Research

Engage: Engagement Strategies

Type	Document	Description
Blueprint: Create a Dynamic Plan to Tackle HR Issues		
	Create a Dynamic Plan to Tackle HR Issues	HR issues are the number one challenge faced by IT leaders, yet very few CIOs have a plan to address this in the coming year. If left unaddressed, these issues will fester and surface at an inopportune time. Take action now. http://www.infotech.com/research/create-a-dynamic-plan-to-tackle-hr-issues
	Storyboard: Create a Dynamic Plan to Tackle HR Issues	IT's most valuable and expensive operational area is human resources. Regrettably, HR is often the most mismanaged area, with 26% of IT leaders facing HR-related issues. This storyboard will help ensure that your department's employee capabilities and engagement are maximized. http://www.infotech.com/research/storyboard-create-a-dynamic-plan-to-tackle-hr-issues
	IT Department HR Assessment	This assessment will analyze the status of HR processes within the IT department. The tool will help IT leaders identify areas where HR processes need improvement, are underperforming, are satisfactory, or are excellent. http://www.infotech.com/research/it-department-hr-assessment
	Project Planning and Monitoring Tool	The beginning stages of the project are dedicated to working out the details of the project task schedule. Take advantage of this tool to determine and create a detailed project plan outlining how the project will progress. http://www.infotech.com/research/project-planning-and-monitoring-tool
	Project Charter Template	Develop a project charter document to get formal sign-off authorizing the initiation of your project. http://www.infotech.com/research/project-charter-template
Empower to Engage		
	Empower to Engage	Effective employee empowerment is the biggest driver of employee engagement, a current hot topic in the HR world. Only 3% of disengaged employees are empowered. http://www.infotech.com/research/empower-to-engage
	Storyboard: Empower to Engage	Employee empowerment is the number one driver of engagement, yet only 34% of employees are empowered. In addition to employee engagement, empowerment has a significant impact on an organization's customer service, profitability, productivity, and retention. http://www.infotech.com/research/storyboard-empower-to-engage
	Authority Matrix	The tool is very basic but can be easily adapted to suit each manager's needs. It uses the RACI matrix (responsible, accountable, consulted, or informed) to describe the participation of relevant roles for tasks and responsibilities. http://www.infotech.com/research/authority-matrix

Type	Document	Description
▶	Manager Webinar: Empower to Engage	Employee empowerment is the number one driver of engagement, yet only 34% of employees are empowered. In addition to employee engagement, empowerment has a significant impact on an organization's customer service, profitability, productivity, and retention. http://www.infotech.com/research/manager-webinar-empower-to-engage
Engage Generation Y		
	Engage Generation Y	Generation Y is entering the workforce in higher numbers than ever before and by 2025, will encompass 75% of the entire North American workforce. Additionally, with the impending retirement of the Baby Boomer workforce population, there will be large skills and leadership gaps in the near future. Organizations must effectively engage and develop Generation Y employees in order to meet the business challenges of tomorrow. http://www.infotech.com/research/engage-generation-y
	Storyboard: Engage Generation Y	Organizations must effectively engage and develop Generation Y employees in order to meet the business challenges of tomorrow. http://www.infotech.com/research/storyboard-engage-generation-y
Implement an Action Plan for Employee Engagement Initiatives		
	Implement an Action Plan for Employee Engagement Initiatives	Employee engagement isn't only about a survey. Organizations must act on employee feedback contained in engagement surveys to drive engagement, and maximize the benefits it offers to the organization. This set will focus on planning and implementing engagement initiatives, once they have been identified and selected by the organization. http://www.infotech.com/research/implement-an-action-plan-for-employee-engagement-initiatives
	Storyboard: Implement an Action Plan for Employee Engagement Initiatives	Employee engagement isn't only about surveys. Organizations must act on employee feedback from engagement surveys to drive engagement and jumpstart initiatives that will positively impact employees. http://www.infotech.com/research/storyboard-implement-an-action-plan-for-employee-engagement-initiatives
	Post-Survey Engagement Program Plan	Use this template to outline each activity in your organization's post-survey process and prepare the relevant pieces of communication in tandem. http://www.infotech.com/research/post-survey-engagement-program-plan
Optimize Rewards and Recognition		
	Optimize Rewards and Recognition	Tweak your department's current rewards and recognition program to improve employee engagement and actually drive the business results that rewards and recognition are supposed to drive. http://www.infotech.com/research/optimize-rewards-and-recognition
	Storyboard: Optimize Rewards and Recognition	Tweak your organization's current rewards and recognition program to improve employee engagement and actually drive the business results that rewards and recognition are supposed to drive. http://www.infotech.com/research/storyboard-optimize-rewards-and-recognition
	Rewards and Recognition Personal Preferences Questionnaire	Individualization of rewards and recognition demonstrates that you know and respect the recipient. It also makes the reward more meaningful and memorable to the employee. http://www.infotech.com/research/rewards-and-recognition-personal-preferences-questionnaire

Type	Document	Description
	Rewards and Recognition Program Satisfaction Survey	When it comes to rewards and recognition, no one knows better what motivates staff than staff themselves. Ask for their input and listen to it. http://www.infotech.com/research/rewards-and-recognition-program-satisfaction-survey

Engage: Engagement Surveys

Blueprint	Document	Description
Identify & Select Employee Engagement Initiatives		
	Identify & Select Employee Engagement Initiatives	Lack of employee engagement survey follow-up and subsequent organizational change result in serious consequences for the key HR performance indicators of employee productivity, retention, and attendance. http://www.infotech.com/research/identify-select-employee-engagement-initiatives
	Storyboard: Identify & Select Employee Engagement Initiatives	The purpose of an engagement survey is organizational change. This is determined through first measuring the drivers of engagement and identifying those in need of improvement. http://www.infotech.com/research/storyboard-identify-select-employee-engagement-initiatives
	Issue and Initiative Team Brainstorming Template	Brainstorming is a powerful team-building and idea generation method because it can increase morale, create a more enjoyable work experience, and empower employees to participate in organizational initiatives. http://www.infotech.com/research/issue-and-initiative-team-brainstorming-template
Make the Case for Employee Engagement		
	Make the Case for Employee Engagement	To face this changing world of work, organizations need to make employee engagement a priority. This solution set makes the case for improving engagement at your organization, starting with an employee engagement survey. http://www.infotech.com/research/make-the-case-for-employee-engagement
	Storyboard: Make the Case for Employee Engagement	The world of work is evolving and changing, and organizations must adapt. To face this changing world, make employee engagement a priority. http://www.infotech.com/research/storyboard-make-the-case-for-employee-engagement
Optimize Employee Engagement Surveys		
	Optimize Employee Engagement Surveys	In most cases, organizations are not only failing to leverage engagement surveys to their full potential, but they are also hurting employee engagement due to the lack of change implementation and communication. http://www.infotech.com/research/optimize-employee-engagement-surveys
	Storyboard: Optimize Employee Engagement Surveys	Gain a better understanding of what effective employee engagement surveys can and should deliver, and how to carry them out. http://www.infotech.com/research/storyboard-optimize-employee-engagement-surveys
	Employee Engagement Survey Project and Communications Plan	Employee engagement surveys are far-reaching initiatives with multiple complex tasks and critical communication points. Treat these surveys as projects with supporting formal plans that detail milestones, deliverables, stakeholders, and goals. http://www.infotech.com/research/employee-engagement-survey-project-and-communications-plan

Blueprint	Document	Description
	Employee Engagement Survey Reporting Tool	Analyzing and reporting survey results can be difficult and tedious. This reporting tool will help you navigate the complex data analysis of the employee engagement survey project. http://www.infotech.com/research/employee-engagement-survey-reporting-tool
	Employee Engagement Survey Project Charter	Employee engagement surveys are enterprise-wide undertakings, and buy-in from all stakeholder groups is critical. Use a project charter to ensure all members of the team are on the same page concerning the survey's mandate. http://www.infotech.com/research/employee-engagement-survey-project-charter

Lead Research

Lead: High Impact Leadership

Type	Document	Description
Fast Track Your Team's Leadership Skills		
	Fast Track Your Teams' Leadership Skills	Often managers in IT were promoted not because of their leadership skills, but because they were top performers in their technical roles. However, the skills needed to excel within leadership are not necessarily the same as their previous roles. http://www.infotech.com/research/fast-track-your-teams-leadership-skills
	Storyboard: Fast Track Your Teams' Leadership Skills	Often managers in IT were promoted not because of their leadership skills, but because they were top performers in their technical roles. Without training you are not providing your team with the skills they need to be successful. http://www.infotech.com/research/storyboard-fast-track-your-teams-leadership-skills
	Be Your Brand (on purpose)	You have a leadership brand whether you know it or not. Take charge of your identity by developing a personal brand that truly represents you, your values, and how you want to be perceived. http://www.infotech.com/research/be-your-brand-on-purpose
	Communicate with Impact	Communication is consistently cited as one of the key engagement issues for staff, yet many managers and leaders believe that their communication is effective. http://www.infotech.com/research/communicate-with-impact
	Conflict Scenarios Handout	Use this template to practice using different approaches to conflict. http://www.infotech.com/research/conflict-scenarios-handout
	Conflict Style Self-Assessment	Understand your approach to conflict resolution. http://www.infotech.com/research/conflict-style-self-assessment
	Inspire to Engage	The ability to inspire your team is crucial to retaining employees and keeping them motivated long term; to do so it's essential they understand how valuable they are to the organization. http://www.infotech.com/research/inspire-to-engage
	Leadership Development Skills: Team Norms	Outline desirable team behavior to set ground rules for expectations and minimize team conflict. http://www.infotech.com/research/leadership-development-skills-team-norms

Type	Document	Description
	Leadership Skill Development Presentation Template	Make the case for the benefits of IT leadership training, and present program goals, objectives, and steps to IT managers. http://www.infotech.com/research/leadership-skill-development-presentation-template
	Leadership Skills Development Assessment	Use Info-Tech's Leadership Skills Assessment tool to determine your leadership skill target state goals. http://www.infotech.com/research/leadership-skills-development-assessment
	Leadership Skills Development Handbook	Use Info-Tech's Leadership Skills Development Handbook to track your personal leadership goals, progress, and metrics. http://www.infotech.com/research/leadership-skills-development-handbook
	Leadership Skills Metric Tracking Tool	Document program metric figures and track them over time to measure program success. http://www.infotech.com/research/leadership-skills-metric-tracking-tool
	Make Meetings Matter	Employees spend on average 37% of their working time in meetings and yet the majority of individuals have never been provided with training on how to effectively facilitate one. http://www.infotech.com/research/make-meetings-matter
	Resolve Conflict Constructively	Conflict does not have to be negative. The presence of conflict in an organization can actually be a very positive thing - the ability to freely express opinions and openly debate can lead to better, more strategic decisions being made. http://www.infotech.com/research/resolve-conflict-constructively
	Use Time Strategically	As a leader you need to think of your time as an investment, and build your schedule to enable priority work to be completed. http://www.infotech.com/research/use-time-strategically
Lead Staff through Change		
	Lead Staff through Change	Managers are often too busy focusing on process elements of change; as a result, they neglect major opportunities to leverage and mitigate staff behaviors that affect the whole team. http://www.infotech.com/research/lead-staff-through-change
	Storyboard: Lead Staff through Change	Focus is often first placed on figuring out the operational and process changes, leaving the people aspect until the end. This is the biggest mistake a manager can make and one that will make successful change initiatives difficult to achieve. http://www.infotech.com/research/storyboard-lead-staff-through-change
	Change Impact Assessment Tool	The purpose of this tool is to aid managers in determining the level of impact a change will have on their staff. http://www.infotech.com/research/change-impact-assessment-tool
	Basic Business Change Communication Worksheet	To effectively communicate with staff, it is important to put the business rationale behind change and its expectations into writing. This will be very useful when questions start to come up and the implementation begins. http://www.infotech.com/research/basic-business-change-communication-worksheet
	Advanced Business Change Description Form	To effectively communicate with staff, it is important to put the business rationale behind changes and their expectations into writing. This will be very useful when questions start to come up and the implementation begins http://www.infotech.com/research/advanced-business-change-description-form

Type	Document	Description
	Change Debrief Questionnaire	This questionnaire is meant to gather feedback from staff members about a recent change process. The purpose of this feedback is to improve the process for future change initiatives. http://www.infotech.com/research/change-debrief-questionnaire
	Lead Staff through Change: Employee Change Personas	Staff members resemble four common personas as they transition through a change process. Learn how to manage each persona differently to leverage and mitigate employee behaviors and drive change forward. http://www.infotech.com/research/lead-staff-through-change-employee-change-personas
Effectively Resolve Team Conflict		
	Effectively Resolve Team Conflict	Almost every organization works in teams in some form or another. However, some do so with great success while others struggle with this type of work. http://www.infotech.com/research/effectively-resolve-team-conflict
	Storyboard: Effectively Resolve Team Conflicts	An organization's ability to successfully obtain the benefits of working in teams relies upon effective transition through the four phases of the team lifecycle - Forming, Storming, Norming, and Performing. http://www.infotech.com/research/storyboard-effectively-resolve-team-conflicts
Select Strategically-Aligned Leadership Competencies		
	Select Strategically-Aligned Leadership Competencies	Setting leadership performance standards is a crucial first step to developing strong leaders. Boost your leadership bench strength by identifying leadership competencies that are central to your business' success and then developing to them. http://www.infotech.com/research/select-strategically-aligned-leadership-competencies
	Storyboard: Select Strategically-Aligned Leadership Competencies	Setting leadership performance standards is a crucial first step to developing strong leaders. Boost your leadership bench strength by identifying leadership competencies that are central to your business' success and then developing to them. http://www.infotech.com/research/storyboard-select-strategically-aligned-leadership-competencies
	Leadership Competencies Workbook	The Leadership Competencies Workbook provides a structured way to document your work through the project to select strategically-aligned leadership competencies. http://www.infotech.com/research/leadership-competencies-workbook
	Leadership Competencies Administration Guidelines	This template allows your organization to determine the owner(s) of the project and their respective responsibilities, and provides a way to organize a variety of administration procedures to enable the sustainability of the competencies. http://www.infotech.com/research/leadership-competencies-administration-guidelines
Train Managers to Handle Difficult Conversations		
	Train Managers to Handle Difficult Conversations	Managers avoiding difficult conversations negatively impacts employees, HR, and the business' bottom-line. Learn to stop avoiding, freezing, or giving in when the going gets tough so that you can reap the benefits of overcoming the challenge. http://www.infotech.com/research/train-managers-to-handle-difficult-conversations

Type	Document	Description
	Storyboard: Handling Difficult Conversations	Many managers struggle when it comes to handling difficult conversations. Learn to stop avoiding and start facing difficult conversations with your direct reports. http://www.infotech.com/research/storyboard-handling-difficult-conversations
	Difficult Conversations Self-Assessment	Use the Difficult Conversations Self-Assessment tool to understand your comfort and behaviors with difficult conversations before and after training. http://www.infotech.com/research/difficult-conversations-self-assessment
	Difficult Conversations Conflict Style Self-Assessment	This Conflict Styles Self-Assessment will help you identify what your dominant conflict style is and how it can be optimized in a difficult conversation. http://www.infotech.com/research/difficult-conversations-conflict-style-self-assessment
Additional Resources		
	Difficult Conversations Manager Toolkit	The Difficult Conversations Manager Toolkit is a takeaway guide for managers to use when they need to review tips and tricks for handling a challenging conversation. http://www.infotech.com/research/difficult-conversations-manager-toolkit

Lead: Succession Planning

Type	Document	Description
Mitigate the Risk of Retirement with Scalable Succession Planning		
	Mitigate the Risk of Retirement with Scalable Succession Planning	Losing employees in key roles without adequate preparation for their departure hinders productivity, knowledge retention, relationships, and opportunities. Practice sound succession planning and risk mitigation tactics to ensure people in key roles don't leave without sharing their valuable skills and knowledge. http://www.infotech.com/research/mitigate-the-risk-of-retirement-with-scalable-succession-planning
	Storyboard: Mitigate the Risk of Retirement with Scalable Succession Planning	Losing employees in key roles without adequate preparation for their departure hinders productivity, knowledge retention, relationships, and opportunities. Implement scalable succession planning to mitigate the risks. http://www.infotech.com/research/storyboard-mitigate-the-risk-of-retirement-with-scalable-succession-planning
	Key Roles Succession Planning Tool	Use this Key Roles Succession Planning Tool to document key roles, incumbents, potential successors, and associated readiness and risk points. http://www.infotech.com/research/key-roles-succession-planning-tool
	Role Transition Plan Template	Many role transitions are characterized by low productivity and lost opportunities. As one employee exits a role and the successor takes over, a clear checklist-based plan will help ensure a smooth and rapid transition. http://www.infotech.com/research/role-transition-plan-template

Manage & Coach Research

Manage & Coach: Coaching

Type	Document	Description
Leverage Agile Goal Setting for Improved Employee Engagement & Performance		
	Leverage Agile Goal Setting for Improved Employee Engagement & Performance	Without a consistent and agile goal-setting environment that pervades every day, managers risk low productivity and disengaged employees. http://www.infotech.com/research/leverage-agile-goal-setting-for-improved-employee-engagement-performance
	Storyboard: Leverage Agile Goal Setting for Improved Employee Engagement & Performance	Managers that empower their employees to set agile goals see increased productivity and employee engagement, which benefits both the manager and the organization as a whole. http://www.infotech.com/research/storyboard-leverage-agile-goal-setting-for-improved-employee-engagement-performance

Manage & Coach: Management Skills

Type	Document	Description
Build Successful Teams		
	Build Successful Teams	To successfully reap the benefits of working in teams, organizations must focus on effective transition through the four phases of the team lifecycle: Forming, Storming, Norming, and Performing. http://www.infotech.com/research/build-successful-teams
	Storyboard: Build Successful Teams	For an organization to successfully obtain the benefits of working in teams, it must effectively transition through the four phases of the team lifecycle: Forming, Storming, Norming, and Performing. http://www.infotech.com/research/storyboard-build-successful-teams
	Skills Inventory Tool	Use this tool to document and track the core skills, personas, and development opportunities available to each team member. http://www.infotech.com/research/skills-inventory-tool
	Team Charter Template	A team charter is a valuable management tool that sets out all those points and serves as a contract for team members. Use this template to create team charters for your projects. http://www.infotech.com/research/team-charter-template
	Team Charter Template	A team charter is a valuable management tool that sets out all those points and serves as a contract for team members. Use this template to create team charters for your projects. http://www.infotech.com/research/team-charter-template
Improve Your Time Management as a Working Manager		
	Improve Your Time Management as a Working Manager	Working managers need to balance their time between getting things done, managing employee responsibilities, and coaching employees to maintain engagement, productivity, and high performance. http://www.infotech.com/research/improve-your-time-management-as-a-working-manager

Type	Document	Description
	Storyboard: Improve Your Time Management as a Working Manager	There are seven roles that make up every Manager's Portfolio: research, innovation, communication, daily operations, personal development, culture building, and staff development. All of these roles are essential to the success of the individual and the team. http://www.infotech.com/research/storyboard-improve-your-time-management-as-a-working-manager
	Characteristic Analysis and Time Management Goal Identification Tool	Characteristic Analysis allows you to determine your ideal placement within the suggested range for each role of the Manager Portfolio by identifying key influences in your environment. http://www.infotech.com/research/characteristic-analysis-and-time-management-goal-identification-tool
Move to High Performance Teams		
	Move to High Performance Teams	To successfully reap the benefits of working in teams, organizations must focus on effective transition through the four phases of the team lifecycle: Forming, Storming, Norming, and Performing. The successful navigation of the Norming and Performing phases leads to high performance and the realization of team objectives. http://www.infotech.com/research/move-to-high-performance-teams
	Storyboard: Move to High Performance Teams	To successfully reap the benefits of working in teams, organizations must focus on effective transition through the four phases of the team lifecycle: Forming, Storming, Norming, and Performing. http://www.infotech.com/research/storyboard-move-to-high-performance-teams
	Team Charter Template	A team charter is a valuable management tool that sets out all those points and serves as a contract for team members. Use this template to create team charters for your projects. http://www.infotech.com/research/team-charter-template
Optimize the Performance of A, B, and C Players		
	Optimize the Performance of A, B, and C Players	Without tailoring your management style to different performance and personality profiles, you risk leaving potential talent on the table. http://www.infotech.com/research/optimize-the-performance-of-a-b-and-c-players
	Storyboard: Optimize the Performance of A, B, and C Players	Most managers leave performance gains on the table because they don't adjust their management style to address employee performance, aspiration, and motivation. Every employee has a different combination of these dimensions, and must be managed differently as a result. http://www.infotech.com/research/storyboard-optimize-the-performance-of-a-b-and-c-players
	A, B, and C Player Management Advice Tool	Managers who adjust their management style to the employee's performance, aspiration, and personality will have greater success with their teams. Managers must adopt specific habits that cater to each type of employee. http://www.infotech.com/research/a-b-and-c-player-management-advice-tool
	Training Deck: How to Manage A, B, and C Players	Most managers leave performance gains on the table because they don't adjust their management style to address employee performance, aspiration, and motivation. Every employee has a different combination of these dimensions and must be managed differently as a result. http://www.infotech.com/research/training-deck-how-to-manage-a-b-and-c-players

Type	Document	Description
	Performance Improvement Plan Template	Use the Performance Improvement Plan Template to build a Performance Development Plan that clearly articulates employee performance expectations and time frames. http://www.infotech.com/research/performance-improvement-plan-template
	Manager Webinar: Optimize the Performance of A, B, and C Players	Every manager faces the challenge of managing different talent and personality profiles. Most leave performance gains on the table because they don't adjust their management approach to meet individual requirements. http://www.infotech.com/research/manager-webinar-optimize-the-performance-of-a-b-and-c-players
	The Six Personas of Your Team	McLean & Company used three dimensions to create employee Personas that managers can use to better manage their employees. Once these Personas are well understood for each employee, use the management advice to help your team thrive. http://www.infotech.com/research/the-six-personas-of-your-team

Manage & Coach: Performance Management

Type	Document	Description
Create & Deliver Performance Appraisal Feedback to Drive Results		
	Create & Deliver Performance Appraisal Feedback to Drive Results	It is difficult to write a performance appraisal (PA) that will improve employee performance, especially for managers who cannot play an active role in every employee's daily work life. http://www.infotech.com/research/create-deliver-performance-appraisal-feedback-to-drive-results
	Storyboard: Create & Deliver Performance Appraisal Feedback to Drive Results	This research will help managers provide context and insight, specific examples and prescriptive advice, and effectively follow-up on employee progress. http://www.infotech.com/research/storyboard-create-deliver-performance-appraisal-feedback-to-drive-results
	Performance Appraisal Scorecard	A review mechanism, such as this scorecard, can greatly improve a program by providing accountability for managers, quality assurance, developmental feedback for managers, data for the appraisal of managers, and ultimately better quality performance appraisal results. http://www.infotech.com/research/performance-appraisal-scorecard
Set Meaningful Employee Performance Measures		
	Set Meaningful Employee Performance Measures	Setting meaningful employee performance measures is a critical component of performance management. Set employees up for success by implementing measures that are holistic and inspire excellent performance, rather than the gaming of measurements. http://www.infotech.com/research/set-meaningful-employee-performance-measures
	Storyboard: Set Meaningful Employee Performance Measures	Effective employee measures are a key element of any organization's performance management program. However, finding the right mix of measures to accurately capture employee performance is a struggle for many managers. http://www.infotech.com/research/storyboard-set-meaningful-employee-performance-measures

Type	Document	Description
	Manager Handout: Set Meaningful Employee Performance Measures	Developing employee performance measures may seem like a daunting task for many time-strapped department heads and managers. This handout provides a concise yet comprehensive introduction to the McLean & Company process for setting effective employee performance measures. http://www.infotech.com/research/manager-handout-set-meaningful-employee-performance-measures
	Employee Performance Measures Template	The Employee Performance Measures Template provides an all-in-one tool for tracking your departmental goals, employee performance measures, reporting requirements, and associated communications. http://www.infotech.com/research/employee-performance-measures-template

Train & Develop Research

Train & Develop: Employee Development

Type	Document	Description
Help Managers Inform, Interact, and Involve on the Way to Team Engagement		
	Help Managers Inform, Interact, and Involve on the Way to Team Engagement	The responsibility of employee engagement has been abdicated to HR and the executive team for years. It's time for managers to take ownership. http://www.infotech.com/research/help-managers-inform-interact-and-involve-on-the-way-to-team-engagement
	Storyboard: Help Managers Inform, Interact, and Involve on the Way to Team Engagement	Employee engagement on the team level should be owned by those who have the greatest impact on employee's daily lives - their managers. http://www.infotech.com/research/storyboard-help-managers-inform-interact-and-involve-on-the-way-to-team-engagement
	Action Planning Worksheet	Without a realistic action plan, your engagement survey results will be meaningless data points. The Action Planning Worksheet provides a simple yet comprehensive way to plan your team's engagement initiatives. http://www.infotech.com/research/action-planning-worksheet
	Engagement Feedback Session Agenda Template	The Engagement Feedback Session Agenda Template provides managers with a customizable, step-by step guide to conducting a team meeting to share insights on what the results mean and where you should go from there. http://www.infotech.com/research/engagement-feedback-session-agenda-template
	Stay Interview Guide	The Stay Interview Guide provides you with a tool to conduct an Engagement Conversation (also known as a stay interview) with their team members. These help you gain insight into elements of an employee's job. http://www.infotech.com/research/stay-interview-guide
	New Hire Conversation Guide	The first step to engaging new employees is getting to know them. New hire conversations are informal interviews that should be conducted within the first 90 days of an employee's tenure. http://www.infotech.com/research/new-hire-conversation-guide

Identify & Reengage the Disengaged		
	Identify & Reengage the Disengaged	As a manager, you own the relationship with the employee but the employee owns their own engagement level. HR can be leveraged to facilitate and support you throughout the process, but not to take on the employee's problem. http://www.infotech.com/research/identify-reengage-the-disengaged
	Storyboard: Identify & Reengage the Disengaged	While it is much easier to rely on organizational and departmental initiatives implemented after an engagement survey, disengaged individuals are often hidden by survey results and completely overlooked. http://www.infotech.com/research/storyboard-identify-reengage-the-disengaged
Implement Effective Employee Development Planning		
	Implement Effective Employee Development Planning	Managers don't always have time to work on development planning causing employees to feel under-appreciated and disengaged. In McLean & Company's engagement survey, only 50% of employees felt they were encouraged to pursue their career development. Engage your employees to own their career development with managers providing guidance and support. http://www.infotech.com/research/implement-effective-employee-development-planning
	Storyboard: Implement Effective Employee Development Planning	Managers don't always have time to work on development planning causing employees to feel underappreciated and disengaged. In McLean & Company's engagement survey, only 50% of employees felt they were encouraged to pursue their career development. If managers do have time for development planning, they think about it from a formal training perspective and don't always consider the many other, more effective, on-the-job forms of development. http://www.infotech.com/research/storyboard-implement-effective-employee-development-planning
	Development Plan Template	Capturing development goals and recording progress, feedback and coaching comments are all an essential part of the development planning process. It helps to keep employees focused, and is an opportunity to celebrate successes when goals are achieved. http://www.infotech.com/research/development-plan-template
	Feedback and Coaching Guide for Managers	Use the Feedback and Coaching Guide as a handy reference tool on how to provide meaningful feedback that will inspire change, and how to coach employees towards achieving their professional development potential. http://www.infotech.com/research/feedback-and-coaching-guide-for-managers
Optimize the Mentoring Program to Build a High-Performing Learning Organization		
	Optimize the Mentoring Program to Build a High-Performing Learning Organization	Mentoring can be more than a senior-junior power relationship. Use this solution set to amp up your program to support the development of quality learning relationships. http://www.infotech.com/research/optimize-the-mentoring-program-to-build-a-high-performing-learning-organization
	Storyboard: Optimize the Mentoring Program to Build a High Performing Learning Organization	As workforce composition shifts, mentoring programs must move beyond the traditional senior-junior format option. Organizational culture and goals will dictate the best approach. http://www.infotech.com/research/storyboard-optimize-the-mentoring-program-to-build-a-high-performing-learning-organization

	Mentoring Program Diagnostic	The Mentoring Program Diagnostic tool helps you to determine your organization's dominant culture (Competitive, Innovative, Cooperative, or Traditional), and then assess how your current mentoring program operates and to what extent it aligns with your overall organizational culture. http://www.infotech.com/research/mentoring-program-diagnostic
	Mentoring Project Plan Template	The Mentoring Project Plan Template provides a central place to track progress and document the necessary details involved with developing a mentoring program. http://www.infotech.com/research/mentoring-project-plan-template
	Peer Mentoring Guidelines	Use this set of guidelines to help learners leverage the advantages of peer mentoring. http://www.infotech.com/research/peer-mentoring-guidelines
	Mentoring Program Guidelines	Implementing a formal mentoring program helps protégés easily connect with suitable mentors, and adds a powerful interactive component to the overall employee development program. http://www.infotech.com/research/mentoring-program-guidelines
	Mentoring Project Feedback Surveys Template	Use the Mentoring Project Feedback Surveys Template to evaluate the program and garner feedback from the program participants. http://www.infotech.com/research/mentoring-project-feedback-surveys-template
	Mentee Preparation Checklist	Help mentees prepare for the mentoring relationship by giving them this preparation checklist prior to your first meeting. This checklist will help the first meeting be more efficient and effective, and set your mentoring relationship up for success. http://www.infotech.com/research/mentee-preparation-checklist
	Mentoring Agreement Template	A mentoring agreement or contract documents the specifics of a mentoring relationship. Use this template to set goals and clarify expectations for a mentoring relationship. http://www.infotech.com/research/mentoring-agreement-template

Train & Develop: Onboarding

Type	Document	Description
Onboard New Hires for Ramp-up & Retention		
	Onboard New Hires for Ramp-up & Retention	Too many new hires end their first few days in a new job disoriented and disillusioned. A positive onboarding experience lays the foundation for faster ramp-up and ongoing engagement, making a new hire much more likely to stay with the organization for the long haul. http://www.infotech.com/research/onboard-new-hires-for-ramp-up-retention
	Storyboard: Onboard New Hires for Ramp-up & Retention	Organizations often treat onboarding like orientation, devoting little time or effort to acclimatizing and engaging new hires. As a result, few organizations are realizing the business benefits that accompany a comprehensive onboarding program. http://www.infotech.com/research/storyboard-onboard-new-hires-for-ramp-up-retention
	KPI Tracking Tool	Use the KPI Tool to help you track the metrics for your onboarding program. http://www.infotech.com/research/kpi-tracking-tool
	Sample Agenda: Day One	Pay attention to the details to ensure a standout first day for new hires. http://www.infotech.com/research/sample-agenda-day-one

Type	Document	Description
	Sample New Employee Welcome Letter	Customize this sample welcome letter and send it in a welcome package two weeks before the new hire's start date to continue the excitement of the job offer. http://www.infotech.com/research/sample-new-employee-welcome-lette r
	Sample Internal Introduction Email	Send out an introduction email a few days before a new hire starts to spread the good news and lay the foundation for an exceptional first day. http://www.infotech.com/research/sample-internal-introduction-email
	Sample Onboarding Checklist	Make sure onboarding tasks aren't forgotten by mandating the use of checklists for everyone involved in onboarding. http://www.infotech.com/research/sample-onboarding-checklist

Industry Research

Gaming & Hospitality Research

Type	Document	Description
Blueprint: Build or Refresh the WLAN		
	Build or Refresh the WLAN	As individuals increasingly seek to remain in touch with their daily lives while travelling, gaming and hospitality venues are expected to remain up to date with the wireless needs of their guests. Enhance your guest experience and improve profitability by successfully implementing your WLAN build or upgrade. http://www.infotech.com/research/build-or-refresh-the-wlan
	Storyboard: Build or Refresh the WLAN	As individuals increasingly seek to remain in touch with their daily lives while travelling or on vacation, gaming and hospitality venues are expected to remain up to date with the wireless needs of their guests. http://www.infotech.com/research/storyboard-build-or-refresh-the-wlan
	Gaming and Hospitality Industry WLAN Acceptable Use Policy	Guest satisfaction and an improved guest experience rating, are two key drivers for the WLAN build or refresh. It is crucial, however, that for the safety and security of your organization, a Guest Acceptable Use Policy is developed. http://www.infotech.com/research/gaming-and-hospitality-industry-wlan-acceptable-use-policy
	Enterprise WLAN Vendor Solution RFP	Selecting your solution for the WLAN build or refresh is one of the most important project decisions. Your RFP will play a key role in ensuring the solution that can best support your technical and business requirements, is selected. http://www.infotech.com/research/enterprise-wlan-vendor-solution-rfp
	Gaming and Hospitality Industry WLAN Build or Refresh Implementation Plan Template	As your team moves to implement the steps in the WLAN build or refresh, keep the project streamlined and on track by documenting each of the steps in the process. http://www.infotech.com/research/gaming-and-hospitality-industry-wlan-build-or-refresh-implementation-plan-template
	WLAN Build or Refresh Business Case Template	Once you have determined how to move your venue's WLAN build or refresh forwards, the next step is to obtain the necessary stakeholder buy-in. Convince all involved parties that this is the right move, using the comprehensive business case document. http://www.infotech.com/research/wlan-build-or-refresh-business-case-template

Type	Document	Description
	Gaming and Hospitality Industry WLAN Task Monitoring Tool	Moving from planning your WLAN build or refresh, to actually executing the project, is a big step. Ease the transition by breaking the process down into steps, and completing the task monitoring tool as you move along. http://www.infotech.com/research/gaming-and-hospitality-industry-wlan-task-monitoring-tool
	WLAN Requirements Gathering Tool	Your venue will have a unique set of business and technical requirements supporting the WLAN build or refresh, that hinge on aspects such as existing infrastructure, guest demographics, and organizational strategic direction. Identify your venue's requirements before moving forwards. http://www.infotech.com/research/wlan-requirements-gathering-tool
	WLAN Solution RFP Scoring Tool	The Scoring Tool will align directly with the RFP and the Requirements Gathering Tool, to quickly help you and your team identify which vendor is best able to fulfill your venue's needs. http://www.infotech.com/research/wlan-solution-rfp-scoring-tool
Vendor Landscape: Business Intelligence for Gaming, Hospitality, and Leisure		
	Vendor Landscape: Business Intelligence for Gaming, Hospitality, and Leisure	Gaming and Hospitality organizations need a powerful business intelligence solution to drive business insights and performance, guest satisfaction, and cost reductions in today's competitive marketplace. http://www.infotech.com/research/vendor-landscape-business-intelligence-for-gaming-hospitality-and-leisure
	Vendor Landscape Storyboard: Business Intelligence for Gaming, Hospitality, and Leisure	This research is designed for gaming and hospitality organizations looking for a flexible, scalable, and powerful Business Intelligence (BI) solution to drive business insights and performance. http://www.infotech.com/research/vendor-landscape-storyboard-business-intelligence-for-gaming-hospitality-and-leisure
	Business Intelligence for Gaming, Hospitality, and Leisure Vendor Shortlist Tool	This tool allows gaming and hospitality organizations to profile their Business Intelligence (BI) requirements and generate a rank-ordered vendor shortlist from a fixed list of vendors. Vendor profiles are based on Info-Tech's review of the GHRC BI market. http://www.infotech.com/research/business-intelligence-for-gaming-hospitality-and-leisure-vendor-shortlist-tool
Vendor Landscape: CRM Suites for Gaming, Hospitality, and Leisure		
	Vendor Landscape: CRM Suites for Gaming, Hospitality, and Leisure	Having a well-oiled CRM platform in place is critical for organizations in the gaming, hospitality, and leisure industries to build profitable patron relationships and experiences through an actionable 360 degree view of the patron. http://www.infotech.com/research/vendor-landscape-crm-suites-for-gaming-hospitality-and-leisure
	Vendor Landscape Storyboard: CRM Suites for Gaming, Hospitality, and Leisure	This research is designed for gaming & hospitality organizations looking for a flexible, scalable, and powerful Customer Relationship Management (CRM) solution to drive patron acquisition, retention, and growth and build profitable patron relationships and experiences. http://www.infotech.com/research/vendor-landscape-storyboard-crm-suites-for-gaming-hospitality-and-leisure
	Gaming, Hospitality, and Leisure CRM Vendor Shortlist Tool	This tool allows gaming & hospitality organizations to profile their Customer Relationship Management (CRM) requirements and generate a rank-ordered vendor shortlist from a fixed list of vendors. http://www.infotech.com/research/gaming-hospitality-and-leisure-crm-vendor-shortlist-tool
Vendor Landscape: iGaming Platforms		

Type	Document	Description
	Vendor Landscape: iGaming Platforms	Choosing the right partner is critical when bringing your brick and mortar into the online world. http://www.infotech.com/research/vendor-landscape-igaming-platforms
	Vendor Landscape Storyboard: iGaming Platforms	This research is designed for gaming and hospitality organizations looking for an iGaming solution. Your organization's use case may include promoting an existing brick-and-mortar casino brand as well as creating a new online brand and casino. Whatever the case is, Info-Tech has determined the most suitable vendors for your organization. http://www.infotech.com/research/vendor-landscape-storyboard-igaming-platforms
	iGaming Platforms Vendor Shortlist Tool	This tool allows gaming and hospitality organizations to profile their iGaming requirements and generate a rank-ordered vendor shortlist from a fixed list of vendors. Vendor profiles are based on Info-Tech's review of the iGaming market. The tool includes the following specific aspects of analysis: http://www.infotech.com/research/igaming-platforms-vendor-shortlist-tool
Develop an iGaming Strategy		
	Develop an iGaming Strategy	Develop an iGaming strategy to engage players after they have left your brick & mortar casino and take advantage of changing US state regulations to unlock a new stream of revenue. Pursue "play for fun" to set yourself up for an easier transition to "pay for play." A play-for-fun model can help you develop brand loyalty and acquire new players in advance of regulated real-money wagering. http://www.infotech.com/research/develop-an-igaming-strategy
	Storyboard: Develop an iGaming Strategy	Undertaking iGaming in an ad hoc manner may lead to a poorly planned project. However, an iGaming project that begins with a well-planned strategy can provide brick and mortar gambling institutions with a number of opportunities including attracting new customers and generating additional revenue. http://www.infotech.com/research/storyboard-develop-an-igaming-strategy
	iGaming Opportunity Assessment Tool	This tool provides a starting point for organizations deciding whether or not to pursue the development of an iGaming strategy, including an assessment of the respective state regulatory environment and organizational readiness for iGaming. http://www.infotech.com/research/igaming-opportunity-assessment-tool
	iGaming Stakeholder Support Measurement Tool	This tool helps automate the measurement of senior management buy-in to the iGaming strategy. http://www.infotech.com/research/igaming-stakeholder-support-measurement-tool
	iGaming Requirements Gathering Tool	Use this tool to document requirements to plan for iGaming initiatives. http://www.infotech.com/research/igaming-requirements-gathering-tool
	iGaming Initiative Scoring, Prioritization, and Roadmap Tool	This tool helps project and management stakeholders visualize the implementation of iGaming initiatives. It can also help stakeholders plan, prioritize, and track initiatives. http://www.infotech.com/research/igaming-initiative-scoring-prioritization-and-roadmap-tool
	iGaming Strategy Project Charter	A project charter serves several important functions. It defines the project and lays the foundation for all subsequent project planning. http://www.infotech.com/research/igaming-strategy-project-charter

Type	Document	Description
	iGaming Strategy Stakeholder Communication Template	The iGaming Strategy Stakeholder Communication Template is a PowerPoint document designed to assist you in the communication of your iGaming strategy to key stakeholders. http://www.infotech.com/research/igaming-strategy-stakeholder-communication-template
	iGaming Stakeholder Interview Guide	The iGaming Stakeholder Interview Guide provides a guide for interviewing key stakeholders in the development of an iGaming strategy. It contains sample questions for conducting departmental interviews, focus groups, user scenario workshops, and use-case workshops. http://www.infotech.com/research/igaming-stakeholder-interview-guide
	iGaming Strategy Business Case Template	The iGaming Strategy Business Case Template assists in the development and presentation of your business case for iGaming initiatives. This template provides you with a basic framework of a business case. Putting together a robust business case is pivotal in deciding whether to pursue any initiative. http://www.infotech.com/research/igaming-strategy-business-case-template
Vendor Landscape: Online Casino Platforms		
	Vendor Landscape Storyboard: Online Casino Platforms	Info-Tech evaluated eleven competitors in the Online Casino Platform market. http://www.infotech.com/research/vendor-landscape-storyboard-online-casino-platforms
	Online Casino Platform Vendor Shortlist Tool	This tool allows large enterprises to generate a customized shortlist of Online Casino Platform vendors based on required capabilities and future requirements for product features, architecture, and usability. http://www.infotech.com/research/online-casino-platform-vendor-shortlist-tool
Vendor Landscape: Mobile Gaming Platforms		
	Vendor Landscape: Mobile Gaming Platforms	Info-Tech evaluated six products in the mobile gaming space, focusing on vendors who offered multiple gaming platforms and integration between them all. http://www.infotech.com/research/it-vendor-landscape-mobile-gaming-platforms
	Vendor Landscape Storyboard: Mobile Gaming Platforms	Info-Tech evaluated six products in the rapidly developing mobile gaming platform space. Use this research to understand current capabilities of mobile gaming platforms and evaluate offerings for best fit with the business. http://www.infotech.com/research/it-vendor-landscape-storyboard-mobile-gaming-platforms
	Mobile Gaming Vendor Shortlist Tool	This tool allows small enterprises to generate a customized shortlist of mobile gaming platform vendors based on required capabilities and future requirements for criteria such as product features, architecture, and usability. http://www.infotech.com/research/it-mobile-gaming-vendor-shortlist-tool
Vendor Landscape: Casino Management Systems		
	Vendor Landscape: Casino Management Systems	Choosing a Casino Management System (CMS) that fits the current and future requirements of the organization can be difficult within this market as differentiation can be clouded by marketing and a lack of publicly available information. http://www.infotech.com/research/it-vendor-landscape-casino-management-systems
	Vendor Landscape Storyboard: Casino Management Systems	Info-Tech evaluated six competitors in the CMS market. http://www.infotech.com/research/it-vendor-landscape-storyboard-casino-management-systems

Type	Document	Description
	Casino Management Systems Vendor Shortlist Tool	This tool allows enterprises to generate a customized shortlist of casino management systems (CMS) based on required capabilities and future requirements for product features, architecture, and usability. http://www.infotech.com/research/casino-management-systems-vendor-shortlist-tool
Vendor Landscape: Online Casino Content		
	Vendor Landscape Storyboard: Online Casino Content	Info-Tech evaluated nine competitors in the Online Casino Content market. http://www.infotech.com/research/vendor-landscape-storyboard-online-casino-content
	Online Casino Content Vendor Shortlist Tool	This tool allows large enterprises to generate a customized shortlist of Online Casino Content vendors based on required capabilities and future requirements for product features, architecture, and usability. http://www.infotech.com/research/online-casino-content-vendor-shortlist-tool
Vendor Landscape: Point of Sale Solutions		
	Vendor Landscape: Point of Sale Solutions	A point of sale (POS) solution does much more than facilitate transactions. Select a POS solution capable of advanced reporting, inventory management, and loss prevention to ensure operational efficiency and transparency. http://www.infotech.com/research/vendor-landscape-point-of-sale-solutions
	Vendor Landscape Storyboard: Point of Sale Solutions	Info-Tech evaluated seven vendors in the POS market. http://www.infotech.com/research/vendor-landscape-storyboard-point-of-sale-solutions
	Point of Sale Solutions Shortlist Tool	This tool allows small enterprises to generate a customized shortlist of Point of Sale (POS) vendors based on required capabilities and future requirements for criteria such as product features, architecture, and usability. http://www.infotech.com/research/point-of-sale-solutions-shortlist-tool
Vendor Landscape: Property Management Systems		
	Vendor Landscape: Property Management Systems	The Property Management System (PMS) is the most critical piece of software in any hotel, but most organizations still base their selection on what their neighbors are using. http://www.infotech.com/research/vendor-landscape-property-management-systems
	Vendor Landscape Storyboard: Property Management Systems	Info-Tech evaluated eight competitors in the Property Management Systems market. http://www.infotech.com/research/vendor-landscape-storyboard-property-management-systems
	Property Management Systems Vendor Shortlist Tool	This tool allows large enterprises to generate a customized shortlist of Property Management System (PMS) vendors based on required capabilities and future requirements for product features, usability, architecture, and integration. http://www.infotech.com/research/property-management-systems-vendor-shortlist-tool
	Retail Point of Sale (POS) Vendor Shortlist Tool	This tool allows organizations to generate a customized shortlist of retail point of sale (POS) solutions based on required capabilities such as product features, architecture, and usability. http://www.infotech.com/research/it-retail-point-of-sale-pos-vendor-shortlist-tool

Vendor Landscape: Revenue Management Systems		
	Vendor Landscape: Revenue Management Systems	Hotel rooms are a perishable commodity in an extremely competitive market rife with promotions, OTAs, and indirect revenues; therefore, hoteliers understand that maximizing the value of every room is crucial to their continued success. A revenue management system (RMS) is a handy tool to assist hoteliers maximize their revenue potential. http://www.infotech.com/research/it-vendor-landscape-revenue-management-systems
	Vendor Landscape Storyboard: Revenue Management Systems	Info-Tech evaluated seven competitors in the revenue management systems market. http://www.infotech.com/research/it-vendor-landscape-storyboard-revenue-management-systems
	Revenue Management Systems Vendor Shortlist Tool	This tool allows organizations to generate a customized shortlist of revenue management system (RMS) solutions based on required capabilities such as product features, architecture, and usability. http://www.infotech.com/research/it-revenue-management-systems-vendor-shortlist-tool

Native American Technology

Type	Document	Description URL
Vendor Landscape: Enrollment and Membership Management Systems		
	Vendor Landscape: Enrollment and Membership Management Systems	Tribal Enrollment and Membership Management solutions offer tribal governments an effective tool to assist in this process, as well as providing new opportunities to understand the dynamics of member bases with advanced reporting and analytics. http://www.infotech.com/research/it-vendor-landscape-enrollment-and-membership-management-systems
	Vendor Landscape Storyboard: Enrollment and Membership Management Systems	Info-Tech evaluated six products in the EMM space. http://www.infotech.com/research/vendor-landscape-storyboard-enrollment-and-membership-management-systems
	Enrollment and Membership Management Solution Vendor Shortlist Tool	This tool allows small enterprises to generate a customized shortlist of EMM vendors based on required capabilities and future requirements for criteria such as product features, architecture, and usability. http://www.infotech.com/research/it-enrollment-and-membership-management-vendor-shortlist-tool
Vendor Landscape: Financial Management Solutions		
	Vendor Landscape: Financial Management Solutions	While there may not be many tribally-focused solutions on the market, the keys to finding a financial management system that will suit a tribe's unique structure and processes are flexibility and adaptability. http://www.infotech.com/research/it-vendor-landscape-financial-management-solutions

Type	Document	Description URL
	Vendor Landscape Storyboard: Financial Management Solutions	Info-Tech evaluated seven competitors in the financial management systems space. http://www.infotech.com/research/it-vendor-landscape-storyboard-financial-management-solutions
	Financial Management Solution Vendor Shortlist Tool	This tool allows tribal governments to generate a customized shortlist of Financial Management Solution vendors based on required capabilities and future requirements for criteria such as product features, architecture, and usability. http://www.infotech.com/research/it-financial-management-solution-vendor-shortlist-tool

Premium Resources

Industry Reports

Type	Document	Description
★	Industry Report: Business & Professional Services	Service firms tend to be smaller enterprises with big technology needs from server to desktop. In this highly competitive environment, IT decision makers need to make the most of every scarce IT dollar invested and wisely use the skills of their entire team. Use these reports to help you make the right budgeting and staffing decisions for your organization. http://www.infotech.com/research/industry-report-business-professional-services
★	Industry Report: Financial Services	Financial institutions have intensive IT requirements that necessitate specialized IT skill sets and significant technology investment to compete. Use these reports to help you make the right decisions, and see how your department compares to your industry peers. The attached PDF contains a consolidated report covering both Financial and Insurance services research. http://www.infotech.com/research/industry-report-financial-insurance-services
★	Industry Report: Education	The Education industry is constantly walking an IT budgeting tightrope. IT professionals must choose their technology and people investments wisely. These reports illustrate how your peers in the Education industry are handling these challenges. http://www.infotech.com/research/industry-report-education
★	Industry Report: Government	Complex IT environments and fluctuating budgets are the norm for Government institutions. They must focus on streamlining processes while providing users with critical IT services. From managing large IT staffs to supporting legacy applications, this report will help you make the right decisions. http://www.infotech.com/research/industry-report-government
★	Industry Report: Health Care	The need for careful IT budgeting and staffing in health care institutions has never been greater. A complex IT environment and low tolerance for errors and downtime means that IT management must hire the right skill sets and make the correct investments. Use this report to learn what your peers are doing. http://www.infotech.com/research/industry-report-health-care

Type	Document	Description
★	Industry Report: Manufacturing	Resource constraint is the name of the game when it comes to IT departments working within the Manufacturing industry. Prioritizing every dollar spent is of primary importance. Learn where your peers are spending their money and how they allocate IT staff by job function. http://www.infotech.com/research/industry-report-manufacturing
★	Industry Report: Primary Industries	Industries such as Forestry, Fishing and Mining invest large sums in technology solutions every year. Make every dollar count. Find out where others in your industry sector are targeting their budgetary spend and allocating IT staffing resources. http://www.infotech.com/research/industry-report-primary-industries
★	Industry Report: Transportation, Utilities and Communications	Complexity is a critical challenge faced by IT departments in the Transportation, Utilities, and Communications industries. Ongoing evaluation of priorities, operations and budgets is essential. Compare against your industry peers to make the right decisions. http://www.infotech.com/research/industry-report-transportation-utilities-and-communications
★	Industry Report: Wholesale & Retail	Wholesale & Retail IT departments operate in highly competitive environments. Supply chain management, demand forecasting, and inventory management place pressure on IT decision makers to be innovative. Supplement your arsenal of decision-making tools by benchmarking your industry peers. http://www.infotech.com/research/industry-report-wholesale-retail

IT Governance

Business Center Research

Business Center: Communications

Type	Document	Description
🔧	Stakeholder Communication Schedule Template	Regular communication of IT initiatives, plans, and the progress of each is the most essential component of building strong stakeholder relationships. Use this communication schedule to deliver timely and meaningful touch points that help IT raise its profile in the enterprise, increase awareness of IT value, and mitigate potential risks. http://www.infotech.com/research/stakeholder-communication-schedule-template

Enterprise IT Center Research

Enterprise IT Center: Networks & Servers

Type	Document	Description
✎	Limited Personal Use of Network Resources Policy	Use Info-Tech's sample limited personal use policy to achieve a balance of end-user opinion and corporate networking interests. http://www.infotech.com/research/limited-personal-use-of-network-resources-policy

Industry Center Research

Industry Center: Manufacturing

Type	Document	Description
🗋	Supply Chain Managers and IT Buyers Unite	When Purchasing and IT collide, the resulting buying decisions may yield a pleasant surprise. Instead of bickering with purchasing and supply chain leaders learn to take advantage their procurement expertise. http://www.infotech.com/research/supply-chain-managers-and-it-buyers-unite

Industry Center: Healthcare

Type	Document	Description
🗋	Disaster Recovery in Healthcare Organizations: Part II	Healthcare organizations continue to face increased regulatory burdens as well as internal and external threats to information security. The ability to restore access to information systems after a major calamity requires a comprehensive Disaster Recovery Plan (DRP). As the second of two 🗋 s, this research 🗋 will provide the template for a DRP that meets HIPAA guidelines and ensures clinical continuity. http://www.infotech.com/research/disaster-recovery-in-healthcare-organizations-part-ii

Industry Center: Financial Services

Type	Document	Description
🗋	Financial Services Takeovers Call for Rapid-Fire Communication	In one week, Bear Stearns saw its stock drop from $64 to $30. The next weekend, employees returned on Monday to find JPMorgan steering the ship and the stock price trading below $6. Hostile takeovers and bailouts can leave IT in the dark. IT leaders in the financial sector must direct IT staff with appropriate crisis communication. http://www.infotech.com/research/financial-services-takeovers-call-for-rapid-fire-communication

Industry Center: Governance & Non-Profit

Type	Document	Description
🗋	Federal Desktop Standards: Investigate Compliance Tools Now	The date for federal agencies to meet the Office of Management and Budget (OMB) mandate for implementing standard Windows desktop configurations has passed, and the official deadline to submit technical compliance reports is fast approaching. Government IT leaders must deploy a validated reporting tool in order to verify and show compliance. http://www.infotech.com/research/federal-desktop-standards-investigate-compliance-tools-now

Strategic Tools Research

Strategic Tools: Process Management

Type	Document	Description
	Step-by-Step SOP Template	Standard Operating Procedures (SOPs) are integral to effectively managing IT processes. There are different approaches to recording SOPs. Consider using a Step-by-Step SOP to describe the simplest of processes or to outline sub-processes within larger SOPs. Refer to this template as an example of a simple, step-by-step approach to writing SOPs. http://www.infotech.com/research/step-by-step-sop-template
	Firewall Change Request Form	If a business user requires a change to the firewall, then use Info-Tech's firewall change request form to help you regulate the process. http://www.infotech.com/research/firewall-change-request-form

Strategic Tools: Service & Support

Type	Document	Description
	Client Software Use Survey	Start with a simple usage survey to find out what kind of software users require on their desktops. http://www.infotech.com/research/client-software-use-survey

Templates & Policies

Application Development

Type	Document	Description
	Software Development Policy	Download this policy to help you regulate software development and code management in your organization. http://www.infotech.com/research/software-development-policy
	Post Implementation Review Template	Conducting a project post implementation review is a crucial step in the lifecycle of a project. Use Info-Tech's Post Implementation Review template to help tackle this important task and to take advantage of the opportunities and insights that can be gained. http://www.infotech.com/research/post-implementation-review-template
	Software Maintenance Self-Assessment	Download Info-Tech's "Software Maintenance Self-Assessment" worksheet for a quick way to assess the current state of software maintenance execution within the enterprise. http://www.infotech.com/research/software-maintenance-self-assessment
	Software Acquisition and Acceptance Testing Policy	Use Info-Tech's sample policy to launch software acquisition management efforts to the top of your priority list. http://www.infotech.com/research/software-acquisition-and-acceptance-testing-policy

Budgeting / Procurement

Type	Document	Description
	Purchasing Policy Template	If the organization does not have a formal purchasing policy, use the OptimizeIT Purchasing Policy Template to document the rules or guidelines for IT purchases when these purchases are sometimes complex and unfamiliar. http://www.infotech.com/research/purchasing-policy-template

Communications

Type	Document	Description
	Best Practice Checklist for Virtual Meetings	Download this best practices checklist and share it with your staff to improve the quality and utility of virtual meetings. http://www.infotech.com/research/best-practice-checklist-for-virtual-meetings
	Meeting Agenda Template	Fill out this agenda template to focus your meetings and get things done. http://www.infotech.com/research/meeting-agenda-template

Department Governance

Type	Document	Description
	Internal Service Level Agreement	Internal Service Level Agreements (SLAs) are the single most effective tool for managing stakeholder expectations of IT service levels. Use Info-Tech's Internal SLA template as a guide to developing SLAs in the enterprise. http://www.infotech.com/research/internal-service-level-agreement
	Desktop Move/Add/Change Policy	Unscheduled moves, adds, and changes (MACs) to desktop systems can lead to a drain on resources and inefficiencies. Draft a move/add/change policy to help you control the process, reduce IT support costs, and increase end-user satisfaction. http://www.infotech.com/research/desktop-moveaddchange-policy
	Information Technology Standards Policy	IT infrastructures are ever-changing. Every decision to bring technology into the enterprise should be guided by a documented standard of what is and is not to be introduced into the IT environment. Use this template to help draft an enterprise-wide Information Technology Standards Policy. http://www.infotech.com/research/information-technology-standards-policy
	Internet Acceptable Use Policy	All enterprises should guide the productive use of Internet services through Internet Acceptable Use Policies. Use this template to help keep the policy up-to-date. http://www.infotech.com/research/internet-acceptable-use-policy
	Administrative Rights Policy	The decision whether or not to grant end users administrative rights is hotly contested, and irritating to enforce. However, in a managed IT environment where security is a priority, administrative rights should be highly restricted, if granted at all. Use this policy to help you maintain control. http://www.infotech.com/research/administrative-rights-policy
	Information Technology Standards and Guidelines	Use this template to help draft an enterprise-wide Information Technology Standards and Guidelines policy. http://www.infotech.com/research/information-technology-standards-and-guidelines

Desktop Systems

Type	Document	Description
	Printer Policy	This downloadable template provides an excellent starting point for developing a comprehensive printer policy in your organization. http://www.infotech.com/research/printer-policy
	Sample MS Word Form	Info-Tech's "Sample MS Word Form" can be used as a template to easily create new Word forms for the enterprise instead of contending with expensive Adobe solutions. http://www.infotech.com/research/sample-ms-word-form
	Hardware Sanitization Policy	This hardware sanitization policy will help ensure that enterprise hardware is properly sanitized prior to disposal. http://www.infotech.com/research/hardware-sanitization-policy

Disaster & Continuity

Type	Document	Description
	Risk Evaluation Form	Use this risk evaluation form in conjunction with a change control policy to manage the change process and mitigate risk. http://www.infotech.com/research/risk-evaluation-form
	Internet Connectivity DRP Preparedness Checklist	Use this checklist to assess your organization's level of risk in the event of Internet connectivity loss. http://www.infotech.com/research/internet-connectivity-drp-preparedness-checklist

Email & Messaging

Type	Document	Description
	Email and Messaging Acceptable Use Policy	Email is the most commonly used application in today's workplace. It is not only an essential business tool, but a potentially dangerous one if mismanaged. Conscientious management by way of a clear and comprehensive policy is essential. This policy template provides a structure for defining your organization's mail acceptable use policy. http://www.infotech.com/research/e-mail-acceptable-use-policy

End-User Support

Type	Document	Description
	End-User Satisfaction Survey	Understanding end-users' attitudes towards IT is essential in improving the overall quality of IT service provision. This End-User IT Satisfaction Survey offers a series of sample satisfaction questions an IT department may wish to present to its user base. http://www.infotech.com/research/end-user-satisfaction-survey

	Help Desk Triage Policy	Help desk triage determines priority levels for problems reported by end users. Employ a triage policy to help the IT department set end-user expectations and effectively manage scarce resources. http://www.infotech.com/research/help-desk-triage-policy
	IT Support Policy	Implement Info-Tech's IT support policy to curb rogue IT support, ease the burden on the help desk, and reclaim lost money. http://www.infotech.com/research/it-support-policy

Enterprise Applications

Type	Document	Description
	Application Assessment Checklist	In an internal cloud, careful assessment of applications is needed in order to make efficient use of current capacity and plan for hardware upgrades to capacity. Use this assessment checklist can be used to gather the requirements of new and updated applications. http://www.infotech.com/research/it-application-assessment-checklist
	Software Installation Policy	Certain types of software can open security holes to the enterprise network. Controlling what software is installed on end-user devices is a critical step in closing these holes. Apply this Software Installation Policy to identify standard software titles and clearly communicate what is prohibited. http://www.infotech.com/research/software-installation-policy

HR Management

Type	Document	Description
	Employee Departure Checklist	Employee departures happen all the time, be they voluntary or involuntary. Regardless of the circumstances, there are key steps that should be taken to protect the enterprise, ensure a smooth transition, and treat the departing employee with the utmost respect. http://www.infotech.com/research/employee-departure-checklist
	Letter of Agreement Template	Use this template to develop a Letter of Agreement with a supplier. This Letter serves as a replacement for a contract in simple cases, or as an interim agreement that allows urgent work to start while a contract is being finalized. http://www.infotech.com/research/letter-of-agreement-template
	Performance Review Template	Use this template to help you develop a standardized, iterative in-house performance review process. http://www.infotech.com/research/performance-review-template
	New Employee IT Resources Request Form	Download this form to help you implement a formal process for setting up new employees, streamline requests, and reduce the load on IT. http://www.infotech.com/research/new-employee-it-resources-request-form
	Anti-Harassment Policy Statements	Make sure you've addressed all the technology issues that can foster a hostile work environment by adding these anti-harassment statements to your acceptable use policies. http://www.infotech.com/research/anti-harassment-policy-statements

Network Management

Type	Document	Description
	Remote Access Policy	Use this template to help you fashion a remote access policy that reflects the needs of your organization. http://www.infotech.com/research/remote-access-policy-and-agreement
	Telephony Services Acceptable Use Policy	This policy template will go a long way toward reducing telephone-related costs and increasing productivity. http://www.infotech.com/research/telephone-and-voicemail-acceptable-use-policy
	Telecom Billing Audit Template	About 80% of all telecom bills contain errors. Your company is not immune. Save money by using this telecom audit template for your company. http://www.infotech.com/research/telecom-billing-audit-template

Operating Systems

Type	Document	Description
	PC Power Management Change Request Form	The "PC Power Management Change Request" form is intended to be used in conjunction with the company "PC Management Policy and Agreement." When an employee would like to request an alteration to their current pre-set PC power settings, they must fill in this request and submit it to the IT department. http://www.infotech.com/research/pc-power-management-change-request-form
	PC Power Management Policy and Agreement	The purpose of this power management policy is to define the roles of all employee groups as well as their responsibilities when it comes to power reduction. This policy outlines the appropriate protocol for requesting exceptions and will assist in the reduction of computer power consumption and subsequent environmental impact and costs. http://www.infotech.com/research/pc-power-management-policy-and-agreement

Project Management

Type	Document	Description
	Project Charter Creation Template	Scope creep can be a nightmare. Manage creep, and much, much more, with this "Project Charter Creation Template". Use this template to plan at the beginning phase of a project to better anticipate and deal with changes when they arise. Topics include organizational roles, change control processes, communication standards, and more. http://www.infotech.com/research/project-charter-creation-template
	Change Control - Freezes & Risk Evaluation Policy	Apply this policy to control systems change in your enterprise and prevent unplanned downtime. http://www.infotech.com/research/change-control-freezes-risk-evaluation-policy
	Change Discussion Draft	Use this change discussion draft at weekly project progress meetings to help document and control the systems change process. http://www.infotech.com/research/change-discussion-draft

	Group Project Template	When putting a project into motion, you must plan from the ground up, and not miss any steps along the way. Info-Tech Research Group has developed a comprehensive Project Plan Template to help those involved prepare for the necessary steps to be taken for any project. http://www.infotech.com/research/group-project-template

Security

Type	Document	Description
	Media Protection Policy Template	Media protection mechanisms allow information to be provided a greater level of security than can be achieved with system-based protection mechanisms alone. Without media protection mechanisms, the potential exists for information assets to be exposed to an unnecessarily high level of risk, particularly in circumstances where that information is taken out of the information system. http://www.infotech.com/research/media-protection-policy-template
	Systems Change Control Policy Template	Configuration change control involves the systematic proposal, justification, implementation, test/evaluation, review, and disposition of changes to information systems, including upgrades and modifications. Without system change control the potential exists that changes could be made to the information system that, either intentionally or unintentionally, degrade the security of the information system, subjecting it to a greater degree of risk. http://www.infotech.com/research/systems-change-control-policy-template
	Firewall Policy	Download this firewall policy template to help you develop, implement, and enforce a set of sound firewall rules. http://www.infotech.com/research/firewall-policy
	Server Configuration Policy	Deploying standard server configurations is a proven method of reducing operating risk. Implementing a server configuration policy is the best way to ensure that all servers have been hardened with consistent security configurations and processes. http://www.infotech.com/research/server-configuration-policy
	Anti-Virus Policy	Develop and implement your own anti-virus strategy using Info-Tech's editable anti-virus policy template to guide you. http://www.infotech.com/research/anti-virus-policy
	Removable Media Acceptable Use Policy	Employees everywhere routinely use USB-based memory devices and other removable media types such as CDs and DVDs to store data, back it up, and move it around. Although they are convenient and inexpensive, such media can endanger corporate data integrity if they are lost or otherwise misused. Define acceptable means of removable media use to prevent a data disaster. http://www.infotech.com/research/removable-media-acceptable-use-policy
	Third-Party Access Policy	Develop a third-party access policy that binds the actions and the responsibilities of the any third party accessing your systems. http://www.infotech.com/research/third-party-access-policy

Storage

Type	Document	Description
	System Availability Calculator	System failures are a serious issue that all companies should examine due to the related and considerable costs that result. Measuring and tracking system availability is essential to evaluate current system capabilities, identify vulnerable areas, and improve overall reliability. http://www.infotech.com/research/system-availability-calculator
	Server Space Usage Policy	Use this policy to preserve the finite amount of storage space available on network servers http://www.infotech.com/research/server-space-usage-policy

Job Descriptions

Application Development

Type	Document	Description
	SharePoint Developer	The SharePoint Developer is responsible for developing business-changing enterprise solutions with SharePoint 2010 and other leading-edge technologies. The ideal candidate will have experience developing web applications using Microsoft and compatible technologies. http://www.infotech.com/research/it-sharepoint-developer
	Application Support Analyst	The Application Support Analyst's role is to deliver support to end users in the organization about how to use various types of software programs efficiently and effectively in fulfilling business objectives. This includes troubleshooting applications and software for all internal customers, such as operations, development, and other business units. The Application Support Analyst is also responsible for assisting in the design, delivery, and improvement of in-house software applications training programs and related courseware. http://www.infotech.com/research/application-support-analyst
	Java Developer	The Java Developer oversees the design and building of Java software applications. This includes researching, designing, documenting, and modifying software specifications throughout the production lifecycle. http://www.infotech.com/research/it-java-developer
	Software Developer	The software developer's role is to design, code, test, and analyze software programs and applications. This includes researching, designing, documenting, and modifying software specifications throughout the production lifecycle. The software developer will also analyze and amend software errors in a timely and accurate fashion and provide status reports where required. http://www.infotech.com/research/software-developer
	Open Source Software (OSS) Architect	The Open Source Software (OSS) Architect is responsible for developing expertise in OSS, creating an enterprise-wide open-source strategy, authorizing or rejecting the use of OSS, and facilitating OSS adoption across the enterprise for both infrastructure and application needs. http://www.infotech.com/research/open-source-software-oss-architect

Type	Document	Description
	Programmer Analyst	The Programmer Analyst's role is to define, develop, test, analyze, and maintain new software applications in support of the achievement of business requirements. This includes writing, coding, testing, and analyzing software programs and applications. The Programmer Analyst will also research, design, document, and modify software specifications throughout the production life cycle. http://www.infotech.com/research/programmer-analyst
	Quality Assurance Analyst	The Quality Assurance Analyst's role is to develop and establish quality assurance standards and measures for the information technology services within the organization. This individual will also gather and analyze data in support of business cases, proposed projects, and systems requirements. This will include writing test plans and scripts for tracking defects and fixes in product development, software application development, information systems, and operations systems. The QA Analyst will apply proven analytical and problem-solving skills to help validate IT processes through careful testing in order to maximize the benefit of business investments in IT initiatives. http://www.infotech.com/research/quality-assurance-analyst
	Software Engineer	The Software Engineer's role is to design, execute, assess, and troubleshoot software programs and applications. This includes configuring, coding, developing, and documenting software specifications throughout the project life cycle. The Software Engineer will also oversee system start-ups in a timely and accurate fashion, and provide support to other departments where required. http://www.infotech.com/research/software-engineer
	Systems Analyst	The Systems Analyst's role is to plan, design, develop, and launch efficient information systems and operations systems in support of core organizational functions. This individual will apply proven communication, analytical and problem-solving skills to help identify, communicate and resolve systems issues in order to maximize the benefit of IT systems investments. http://www.infotech.com/research/systems-analyst
	System/Software Application Tester	The Systems/Software Application Tester's role is to plan, design, architect, and deploy effective test suites and regimes for in-house product development, software application development, information system launches, and operations systems enhancements. This individual will apply proven analytical and problem-solving skills to help validate, verify, communicate, and resolve systems/software application issues through careful testing in order to maximize the benefit of IT investments and initiatives. http://www.infotech.com/research/systemsoftware-application-tester
	Technical Writer	The Technical Writer's role is to develop written information about the organization's computing systems that aid in their development, use, and support. Outputs will include a range of documents to be read by both technical and non-technical personnel across all departments. http://www.infotech.com/research/technical-writer

Type	Document	Description
	User Interface Analyst	The role of the User Interface Analyst is to prototype, design, and build graphic user interfaces (GUIs) for software development, Web forms, and other applications. This includes capturing user requirements through collaboration with business analysts, leading and participating in testing sessions, and coordinating final implementation of the GUI based on feedback. Use of a variety of Web and software development languages is required. http://www.infotech.com/research/user-interface-analyst
	Systems Architect	The Systems Architect's role is to strategically design and implement in-house information systems and networked software architectures that support core organizational functions, and assure their high availability. This individual will gain organizational commitment for all systems and software plans, as well as evaluate and select all technologies required to complete those plans. In addition, the Systems Architect provides technical leadership across the organization, from strategic decision making down to the project planning level. http://www.infotech.com/research/systems-architect
	Business Process Analyst	The Business Process Analyst's role is to devise and design business process requirements for all IT-related business, financial, and operations systems critical to core organizational functions. This includes researching and analyzing data in support of business functions, process knowledge, and systems requirements. http://www.infotech.com/research/business-process-analyst
	Business Systems Analyst	The Business Systems Analyst's role is to plan, design, develop, and launch efficient business, financial, and operations systems in support of core organizational functions and business processes. This includes gathering and analyzing data in support of business cases, proposed projects, and systems requirements. The Business Systems Analyst is also responsible for generating and compiling reports based on their findings, complete with probable causes and possible solutions to systems issues. This individual will apply proven communication, analytical, and problem-solving skills to help maximize the benefit of IT system investments. http://www.infotech.com/research/business-systems-analyst
	Multimedia Developer	The Multimedia Developer's role is to provide media development services for projects, products, and applications across the enterprise. This includes designing, building, and implementing new multimedia pages, graphics, and CD-ROMs; integrating these with back end applications and company Web sites/intranet; and performing day-to-day administration of the organization's multimedia portfolio. Use of a variety of Web development languages is essential. http://www.infotech.com/research/multimedia-developer
	Systems Engineer	The Systems Engineer's role is to ensure the stability, integrity, and efficient operation of the in-house information systems that support core organizational functions. This is achieved by monitoring, maintaining, supporting, and optimizing all networked software and associated operating systems. The Systems Engineer will apply proven communication, analytical, and problem-solving skills to help identify, communicate, and resolve issues in order to maximize the benefit of IT systems investments. http://www.infotech.com/research/systems-engineer

Type	Document	Description
	Quality Assurance Manager	The Quality Assurance Manager's role is to develop, establish, and enforce quality assurance standards and measures for the information technology services within the organization. Overseeing a contingent of QA Analysts, QA Team Leads, and QA Engineers, this individual will direct research and development in support of business cases, proposed projects, and systems requirements over the course of software development lifecycles. The QA Manager will apply proven analytical and problem-solving skills to help validate IT processes through careful testing in order to maximize the benefit of business investments in IT initiatives. http://www.infotech.com/research/quality-assurance-manager
	Application Development Manager	The Application Development Manager's role is to plan, coordinate, and supervise all activities related to the design, development, and implementation of organizational information systems and software applications. The Application Development Manager is also responsible for maintaining, supporting, and upgrading existing systems and applications. This individual will apply proven communication skills, problem-solving skills, and knowledge of best practices to guide his/her development team on issues related to the design, development, and deployment of mission-critical information and software systems. http://www.infotech.com/research/application-development-manager
	eBusiness Specialist	The eBusiness Specialist's role is to coordinate, direct, and integrate the company's e-commerce Web sites, services, and applications for the purpose of smooth business-to-business and business-to-customer transactions. This includes the development of e-commerce and e-business strategies for leveraging organizational procedures and processes via the Internet. This individual is also responsible for working closely with Web development staff to ensure the design, implementation, and administration of the company's Web portfolio. Understanding of a variety of Web development languages is required. http://www.infotech.com/research/ebusiness-specialist
	Applications Manager	The Applications Manager's role is to supervise and maintain the organization's repository of software applications through best practices and the appropriate staffing and management of a technical team. The Applications Manager is also responsible for planning and coordinating the processes required for the provision of user applications and systems necessary for business operations. This individual will apply proven communication and problem-solving skills to guide and assist the user group on issues related to the design, development, and deployment of mission-critical information and software systems. http://www.infotech.com/research/applications-manager
	Business Requirements Analyst	The Business Requirements Analyst's role is to elicit, analyze, specify, and validate the business needs of project stakeholders, be they customers or end-users. This includes interviewing stakeholders and gathering and compiling user requirements to convey to development teams throughout the software lifecycle. This Business Requirements Analyst will also apply proven communication, analytical, and problem-solving skills to help support the development process, and to ensure that project deliverables are met according to specifications. http://www.infotech.com/research/business-requirements-analyst

Budgeting/Procurement

Type	Document	Description
	IT Asset Manager	The role of the IT Asset Manager is to oversee the daily and long-term strategic management of software and technology-related hardware within the organization. http://www.infotech.com/research/it-asset-manager
	Vendor Portfolio Manager	The role of the Vendor Portfolio Manager is pivotal in the IT department's interactions with suppliers of services, hardware, and software. The portfolio manager provides product and service purchasing guidance for the entire IT department. http://www.infotech.com/research/vendor-portfolio-manager
	Procurement Manager	The role of the Purchasing/Procurement Manager is to plan, execute, and finalize purchasing and procurement strategies for technology spend across the organization. http://www.infotech.com/research/purchasing-procurement-manager
	Contract Manager	The role of the Contract Manager is to support, manage, and administer contracts for technology spending on services and products across the organization. http://www.infotech.com/research/contract-manager
	SLA Manager	The role of the SLA Manager is to ensure that all service level agreements (SLAs) for information technology services across the organization are delivered according to specifications. This includes developing, managing, and administering service management best practices. The SLA Manager will also facilitate communication between the IT department and its clients in order to define and maintain the SLAs required for each business unit. http://www.infotech.com/research/sla-manager
	Software Licensing Manager	The role of the Software Licensing Manager is to support, manage, and administer contracts for software and application services and products across the organization. This includes overseeing technology spending, managing a repository of applications, and issuing Requests for Proposal, Requests for Quote, and Invitations to Bid. The Software Licensing Manager will also define and facilitate communication between the enterprise and its providers in order to deliver software and applications according to plan and within budget, and to ensure licensing compliance. http://www.infotech.com/research/software-licensing-manager

Collaboration

Type	Document	Description
	Collaboration Business Analyst	To successfully implement a collaboration platform, put the right people behind the implementation. If the budget allows, hire a dedicated resource to execute the implementation to increase user uptake. The Collaboration Business Analyst plays a pivotal role in ensuring that IT understands the business requirements for collaboration by creating a strategic relationship between the business and IT. http://www.infotech.com/research/it-collaboration-business-analyst

Type	Document	Description
	Collaboration Business Analyst	To successfully implement a collaboration platform, put the right people behind the implementation. If the budget allows, hire a dedicated resource to execute the implementation to increase user uptake. The Collaboration Business Analyst plays a pivotal role in ensuring that IT understands the business requirements for collaboration by creating a strategic relationship between the business and IT. http://www.infotech.com/research/it-collaboration-business-analyst
	Webmaster	The Webmaster's role is to coordinate the planning, maintenance, and accessibility of Web site content in a way that ensures the consistency of the Web site's look and feel. This individual is also responsible for creating some original Web site content. Understanding of a variety of Web development languages is required. http://www.infotech.com/research/webmaster
	Lotus Notes Administrator	The Lotus Notes Administrator's role is to ensure the stable operation of in-house e-mail messaging systems and their corresponding hardware and software. This includes planning, developing, installing, configuring, maintaining, supporting, and optimizing all network connections and communication links. This person will also analyze and resolve end-user messaging program and connectivity issues in a timely and accurate fashion, and provide end-user training where required. http://www.infotech.com/research/lotus-notes-administrator
	AV Technician	http://www.infotech.com/research/av-technician
	Knowledge Manager	The Knowledge Manager's role is to collect, synthesize, organize, and manage corporate information and information services in support of business units across the enterprise. This includes accumulating, understanding, and leveraging industry-specific knowledge for the benefit of the organization, its clients, its employees, and its business partners. The Knowledge Manager is also responsible for generating some original information and knowledge assets. Top-level critical analysis and customer service skills are essential for this role. http://www.infotech.com/research/knowledge-manager
	Corporate Librarian	The Corporate Librarian's role is to manage and maintain all company-owned information resources and associated content. This includes ensuring that the storing, archiving, and taxonomical layout of information resources are consistent across and throughout the organization. The Corporate Librarian is also responsible for developing and implementing cataloging systems, as well preserving the freshness and accuracy of cataloged items. Understanding of a broad range of software packages and tools is required. http://www.infotech.com/research/corporate-librarian
	EDI Specialist	The EDI Specialist's role is to develop, coordinate, implement, and communicate the organization's Internet-based strategies and initiatives for legacy Electronic Data Interchange (EDI) systems. This individual is responsible for ensuring that EDI-related production and procedures are maintained and properly executed, including development, change requests, and enterprise integration projects. The EDI Specialist will also act as liaison between end users and the IT staff implementing EDI-based applications. http://www.infotech.com/research/edi-specialist

Type	Document	Description
	Collaboration Business Analyst	To successfully implement a collaboration platform, put the right people behind the implementation. If the budget allows, hire a dedicated resource to execute the implementation to increase user uptake. The Collaboration Business Analyst plays a pivotal role in ensuring that IT understands the business requirements for collaboration by creating a strategic relationship between the business and IT. http://www.infotech.com/research/it-collaboration-business-analyst

Data & Digital Assets

Type	Document	Description
	Enterprise Data Architect	The role of the Enterprise Data Architect is to expand the company's use of data as a strategic enabler of corporate goals and objectives. The Enterprise Data Architect will achieve this by strategically designing, developing, and implementing data models for enterprise-level applications and systems. These models shall be architected at the following layers: conceptual, logical, business area, and application. This individual will act as the primary advocate of data modeling methodologies and data processing best practices. http://www.infotech.com/research/enterprise-data-architect
	Business Intelligence Specialist	The Business Intelligence Specialist's role is to strategically design and implement BI software and systems, including integration with databases and data warehouses. This includes selecting, blueprinting, gathering requirements, designing, and rolling out BI solutions to end users. The Business Intelligence Specialist is also responsible for ensuring high levels of BI availability through support functions and in-depth testing. http://www.infotech.com/research/business-intelligence-specialist
	Geographic Information Systems (GIS) Manager	The Geographic Information Systems (GIS) Manager's role is to coordinate, implement, and manage the organization's Internet-based strategies and initiatives for GIS software. This individual is responsible for ensuring the development and maintenance of applications based upon spatially referenced data and digital mapping. The GIS Manager will also preserve the integrity and design of geographic information databases, as well as manage and direct a team of IT professionals whose purpose is to support GIS functions. http://www.infotech.com/research/geographic-information-systems-gis-manager
	PACS Administrator	The PACS Administrator's role is to perform all related activities for supporting the hospital's Picture Archiving and Communications System (PACS). This includes preparing images for digital archiving and assuring the quality control of medical diagnostic images and files. The PACS Administrator is also responsible for diagnosing, repairing, maintaining, and upgrading all PACS associated hardware and software, while ensuring its optimal performance. http://www.infotech.com/research/pacs-administrator

Type	Document	Description
	Report Writer	The Report Writer's role is to examine and evaluate reporting requirements for various business units across the organization. This individual will use proven knowledge of specialized reporting tools to develop reporting structures as required. The Report Writer is also responsible for proactively generating and compiling reports based on his or her findings, complete with recommended improvements to or new requirements for business processes, operational procedures, and their corresponding reporting structures. http://www.infotech.com/research/report-writer
	Content Manager	The Content Manager's role is to coordinate the planning, maintenance, and accessibility of company owned and generated content and content-related services. This includes ensuring that the layout, positioning, navigation, and look and feel of content are consistent across and throughout the organization. The Content Manager is also responsible for creating some original content. Understanding of Web development languages and publishing tools is required. http://www.infotech.com/research/content-manager
	Database Developer	The Database Developer's role is to strategically design and implement databases across the organization, while ensuring high levels of data availability. This individual is also responsible for defining standards and models for database architectures. The Database Developer will in addition evaluate and select all technology components, such as software, hardware, and networking capabilities, for database management systems and applications. http://www.infotech.com/research/database-developer
	Data/Data Mining Specialist	The Data/Data Mining Specialist's role is to design data modeling/analysis services used to mine enterprise systems and applications for knowledge and information that enhances business processes. This individual is also responsible for building, deploying, and maintaining data support tools, metadata inventories, and definitions for database file/table creation. http://www.infotech.com/research/datadata-mining-specialist
	Database Administrator	The Database Administrator's role is to design, install, monitor, maintain, and performance tune production databases while ensuring high levels of data availability. This individual is also responsible for developing, implementing, and overseeing database policies and procedures to ensure the integrity and availability of databases and their accompanying software. http://www.infotech.com/research/database-administrator
	Database Analyst	The Database Analyst's role is to direct, evaluate, review, and manage database resources and services across the organization while ensuring high levels of data quality. This individual is also responsible for developing, implementing, and overseeing database policies and procedures to ensure the integrity and availability of databases and their accompanying software. Where required, the Database Analyst will design, install, monitor, maintain, and performance tune production databases. http://www.infotech.com/research/database-analyst

Type	Document	Description
	Document Imaging Specialist	The Document Imaging Specialist's role is to perform production activities for supporting in-house document retention policies and procedures. This includes preparing documents for scanning, operating scanning equipment, and assuring the quality control of corporate images and files. The Document Imaging Specialist is also responsible for diagnosing, repairing, maintaining, and upgrading all scanning hardware and software, while ensuring its optimal performance. http://www.infotech.com/research/document-imaging-specialist
	Data Warehouse Architect	The Data Warehouse Architect's role is to strategically design and implement data warehouses, data marts, and data stores, while ensuring high levels of data availability. This individual is also responsible for defining data standards and models for warehouse architectures. The Data Warehouse Architect will in addition evaluate and select all infrastructure components such as software, hardware, database management systems and networking capabilities. http://www.infotech.com/research/data-warehouse-architect

Department Governance

Type	Document	Description
	Operations Manager	The Operations Manager's role is to supervise and ensure the efficient operation of the company's network, client servers, databases, and equipment. This includes managing IT staff responsible for monitoring and diagnosing network and hardware problems. http://www.infotech.com/research/operations-manager
	Project Manager	The role of the Project Manager is to plan, execute, and finalize projects according to strict deadlines and within budget. This includes acquiring resources and coordinating the efforts of team members and third-party contractors or consultants in order to deliver projects according to plan. The Project Manager will also define the project's objectives and oversee quality control throughout its life cycle. http://www.infotech.com/research/project-manager
	Project Office Manager	The role of the Project Office Manager is to establish, implement, develop, and control best practices for IT project management throughout the organization. This includes defining and documenting all policies and processes of project lifecycles in order to deliver these projects according to plan and within budget. The Project Office Manager will also create formal methodologies for defining project key performance metrics and allocating resources. http://www.infotech.com/research/project-office-manager

Type	Document	Description
	Director of IT	The Director of Information Technology's primary responsibility is to oversee the streamlined operation of the IT department and to ensure it aligns with the business objectives of the organization. This individual's principal goals are to develop and manage application portfolios for each department and to attain all IT service level agreements for the user community within the organization. The Director of IT will plan, coordinate, direct, and design all operational activities of the IT department, as well as provide direction and support for IT solutions that enhance mission-critical business operations. The Director of IT will work closely with decision makers in other departments to identify, recommend, develop, implement, and support cost-effective technology solutions for all aspects of the organization. http://www.infotech.com/research/director-of-it
	Help Desk Manager	The Help Desk Manager's role is to oversee the entire Help Desk staff and ensure that end users are receiving the appropriate assistance. This includes the responsibility of managing all procedures related to the identification, prioritization, and resolution of end user help requests, including the monitoring, tracking, and coordination of Help Desk functions. The Help Desk Manager will also contribute to problem resolution by giving in-person, hands-on support to end users at the desktop level. http://www.infotech.com/research/help-desk-manager
	IT Controls Auditor	The IT Controls Auditor plays a pivotal role in ensuring the enterprise's compliance with the Sarbanes-Oxley Act/Bill 198 (SarbOx). http://www.infotech.com/research/it-controls-auditor
	IT Manager	The IT Manager's role is to ensure the streamlined operation of the IT Department in alignment with the business objectives of the organization. This individual will plan, coordinate, direct, and design IT-related activities of the organization, as well as provide administrative direction and support for daily operational activities of the IT department. The IT Manager will work closely with decision makers in other departments to identify, recommend, develop, implement, and support cost-effective technology solutions for all aspects of the organization. This person will also define and implement IT policies, procedures, and best practices. http://www.infotech.com/research/it-manager
	Chief Technology Officer	The Chief Technology Officer's role is to align technology vision with business strategy by integrating company processes with the appropriate technologies. The Chief Technology Officer is also responsible for all aspects of developing and implementing technology initiatives within the organization. This individual maintains existing enterprise systems, while providing direction in all technology related issues in support of information operations and core company values. http://www.infotech.com/research/chief-technology-officer

Type	Document	Description
	Sarbanes-Oxley Project Manager	The role of the Sarbanes-Oxley Project Manager is to plan, develop, and implement Sarbanes-Oxley (SarbOx) business projects on time and within budget. In particular, this individual's primary responsibility will be to assess and remedy the effectiveness of internal controls over financial reporting across the enterprise. The Sarbanes-Oxley Project Manager shall work closely with internal and external audit teams, the IT department, steering committees, accountants, consultants, and other key stakeholders to ensure strict compliance with relevant sections of the Sarbanes-Oxley Act of 2002. http://www.infotech.com/research/sarbanes-oxley-project-manager
	Change Management Specialist	The Change Management Specialist's role is to facilitate the adoption of new or improved processes and/or procedures across the organization. These changes in governance could include technology implementations, workforce/human resources transformations, and corporate policies. The Change Management Specialist will oversee the development and deployment of change management methodologies and procedures to guide the adoption process. This individual will apply proven communication, analytical, and problem-solving skills to help maximize the benefit of organizational directives and their business goals. http://www.infotech.com/research/change-management-specialist
	Chief Information Security Officer	The Chief Information Security Officer's role is to provide vision and leadership for developing and supporting security initiatives. The Chief Information Security Officer directs the planning and implementation of enterprise IT system, business operation, and facility defenses against security breaches and vulnerability issues. This individual is also responsible for auditing existing systems, while directing the administration of security policies, activities, and standards. http://www.infotech.com/research/chief-information-security-officer
	Chief Information Officer	The Chief Information Officer's role is to provide vision and leadership for developing and implementing information technology initiatives. The Chief Information Officer directs the planning and implementation of enterprise IT systems in support of business operations in order to improve cost effectiveness, service quality, and business development. This individual is responsible for all aspects of the organization's information technology and systems. http://www.infotech.com/research/chief-information-officer

Desktop Systems

Type	Document	Description
	PC Technician	The PC Technician's role is to support and maintain in-house computer systems, desktops, and peripherals. This includes installing, diagnosing, repairing, maintaining, and upgrading all hardware and equipment while ensuring optimal workstation performance. The person will also troubleshoot problem areas in a timely and accurate fashion, and provide end user training and assistance where required. http://www.infotech.com/research/pc-technician

Type	Document	Description
	Citrix Administrator	The Citrix Administrator's role is to manage and performance-tune Citrix systems, networks, and applications to ensure high levels of availability and security of the supported business applications. This individual also participates in the planning and implementation of policies and procedures to ensure Citrix system provisioning and maintenance that is consistent with company goals, industry best practices, and regulatory requirements. http://www.infotech.com/research/citrix-administrator
	Desktop Technician	The Desktop Technician's role is to provide a single point of contact for end-users to receive support and maintenance within the organization's desktop computing environment. This includes installing, diagnosing, repairing, maintaining, and upgrading all PC hardware and equipment to ensure optimal workstation performance. The person will also troubleshoot problem areas (in person, by telephone, or via e-mail) in a timely and accurate fashion, and provide end-user assistance where required. http://www.infotech.com/research/desktop-technician
	Hardware Technician	The Hardware Technician's role is to support and maintain in-house technology equipment and IT assets. This includes installing, configuring, diagnosing, repairing, and upgrading all corporate hardware and equipment while ensuring its optimal performance. The person will also troubleshoot problem areas in a timely and accurate fashion, and provide end user training and assistance where required. http://www.infotech.com/research/hardware-technician

Disaster & Continuity

Type	Document	Description
	Disaster Recovery Administrator	The Disaster Recovery Administrator's role is to ensure the security and integrity of data, data systems, and data networks across the entire organization. This includes designing and implementing disaster recovery processes and business continuity procedures for re-establishing servers, databases, and operating systems in the event of a disruption, both minor and catastrophic. This person will also perform and analyze disaster simulations for the prompt restoration of services, and conduct security audits where required. http://www.infotech.com/research/disaster-recovery-administrator

Email & Messaging

Type	Document	Description
	MS Exchange Administrator	The Exchange Administrator's role is to manage Exchange servers and related components to achieve high availability and performance of the various business applications supported. This individual also participates in the planning and implementation of policies and procedures to ensure Exchange provisioning and maintenance that is consistent with company goals, industry best practices, and regulatory requirements. http://www.infotech.com/research/ms-exchange-administrator

End-User Support

Type	Document	Description
	Service Desk Manager	The Service Desk Manager's role is to oversee all Service Desk staff and ensure that end users are receiving the appropriate assistance. This includes the responsibility of managing all procedures related to identification, prioritization and resolution of incidents, including the monitoring, tracking and coordination of Service Desk functions. http://www.infotech.com/research/service-desk-manager
	Service Desk Technician I	The Level I Service Desk Technician's role is to ensure proper computer operation so that end users can accomplish business tasks. This includes receiving, prioritizing, documenting and actively resolving end user help requests and escalating incidents when considered appropriate and necessary to maintain SLA expectations. http://www.infotech.com/research/service-desk-technician-i
	Service Desk Technician II	The Level II Service Desk Technician's role is to ensure proper computer operation so that end users can accomplish business tasks. This includes actively resolving escalated end user help requests within established SLAs. http://www.infotech.com/research/service-desk-technician-ii
	Continual Service Improvement Manager	This role represents a source of accountability for the continual improvement program. The CSI Manager will be the champion for all Continual Service Improvement initiatives. The Improvement Manager is responsible for the creation and maintenance of a continual service improvement program responsible for maintaining and improving ongoing quality in IT services. The candidate will be held accountable for the outcome of ongoing improvement activities. http://www.infotech.com/research/continual-service-improvement-manager
	Help Desk Technician	The Help Desk Technician's role is to ensure proper computer operation so that end users can accomplish business tasks. This includes receiving, prioritizing, documenting, and actively resolving end user help requests. Problem resolution may involve the use of diagnostic and help request tracking tools, as well as require that the individual give in-person, hands-on help at the desktop level. http://www.infotech.com/research/help-desk-technician
	Software Applications Trainer	The Software Applications Trainer's role is to deliver training to end users in the organization about how to use various types of software programs efficiently and effectively in support of business objectives. This individual is responsible for designing, delivering, and improving in-house software applications training programs and related courseware. http://www.infotech.com/research/software-applications-trainer
	e-Learning Specialist	The e-Learning Specialist's role is to deliver training to end users via Web-based educational models and corresponding software tools. This individual is responsible for developing strategies and technologies that leverage digital media to instruct and educate staff across the organization. The e-Learning Specialist will also participate in the design, construction, and implementation of corporate intranets, e-learning applications, and courseware that support business objectives. http://www.infotech.com/research/e-learning-specialist

Enterprise Applications

Type	Document	Description
	SharePoint Designer	The SharePoint Designer is responsible for implementing custom workflow, collaboration, and document management solutions in Microsoft SharePoint Server 2010 using a combination of SharePoint Designer, built-in functionality, and custom web parts provided by our development team or external sources. http://www.infotech.com/research/it-sharepoint-designer
	SharePoint Administrator	The SharePoint Administrator is responsible for the administration and maintenance of the SharePoint application and servers in the SharePoint farm. http://www.infotech.com/research/it-sharepoint-administrator
	SharePoint Solutions Architect	The SharePoint Solutions Architect will be the point person for all SharePoint projects. This includes leading the SharePoint team in the analysis, design, development, and deployment of SharePoint solutions. http://www.infotech.com/research/it-sharepoint-solutions-architect
	SharePoint Business Analyst	The responsibilities of the SharePoint Business Analyst will include working with all stakeholders (including business leaders and end users) to analyze business needs and assist in designing appropriate solutions. http://www.infotech.com/research/it-sharepoint-business-analyst
	Mainframe Computer Operator	The Mainframe Computer Operator's role is to observe and control the company's mainframe computer systems and peripheral equipment for the purpose of uninterrupted data processing, operating runs, and batch program jobs. This includes monitoring system consoles for error indicators, error messages, failures, and peripheral malfunctions. The Mainframe Computer Operator will apply proven analytical and problem-solving skills to identify, diagnose, and resolve malfunctions leading to system or network recovery. http://www.infotech.com/research/mainframe-computer-operator
	Clinical Informatics Specialist	The Clinical Informatics Specialist shall act as a liaison between the hospital's clinical areas and the IT department. This includes the primary responsibility of determining the needs and requirements for clinical applications in acute and ambulatory healthcare settings. The Clinical Informatics Specialist will also lead the evaluation, selection, and implementation of clinical systems (i.e. EMR, PACS, digital imaging, etc.). This individual will work with staff and physicians to optimize the usage of clinical systems through education and training, quality outcomes, and providing support in accordance with organizational goals. http://www.infotech.com/research/clinical-informatics-specialist
	CAD Operator	The CAD Operator's role is to prepare complex drawings, diagrams, and documents using computer-aided design (CAD) software within the organization. This includes developing CAD files based on s, sketches, engineering schematics, technical guides, vendor information, and so on. The CAD Operator will produce CAD files in a timely and accurate fashion. This position may include duties involving artwork and other graphical elements. http://www.infotech.com/research/cad-operator

Type	Document	Description
	SAP Administrator	The SAP Administrator's role is to supervise and operate the organization's SAP systems through implementation best practices. This includes installing, configuring, patching, upgrading, and maintaining the company's investments in proprietary SAP technologies. The SAP Administrator is also responsible for planning and coordinating the change management of processes required for the support of SAP systems necessary for business operations. This individual will apply proven communication and problem-solving skills to solve issues related to the deployment of mission-critical SAP software. http://www.infotech.com/research/sap-administrator
	CAD Manager	The CAD Manager's role is to ensure the stable operation of in-house CAD (computer-aided design) software within the organization. This includes developing, installing, configuring, maintaining, supporting, and optimizing all CAD installations across the enterprise. The CAD Manager will also analyze and resolve user CAD program issues in a timely and accurate fashion, and provide end-user training where required. This position may require the management of a team of CAD engineers, drafters, designers, and/or technicians. http://www.infotech.com/research/cad-manager
	CRM Manager	The CRM Manager's role is to supervise and maintain the installation, configuration, and support of the organization's customer relationship management (CRM) software through best practices and management of a technical team. This person will analyze and resolve CRM program issues in a timely and accurate fashion as well as hold responsibility for monitoring data quality. The CRM Manager will also apply proven communication and problem-solving skills to guide and assist the user group on issues related to the design, development, and deployment of CRM software critical to business operations. http://www.infotech.com/research/crm-manager

HR Management

Type	Document	Description
	ERP Project Sponsor	The ERP Project Sponsor is a current enterprise employee that owns ERP for the project duration. They are expected to make the ERP project account for at least 50% of their time. http://www.infotech.com/research/it-erp-project-sponsor

Network Management

Type	Document	Description
	Telecommunications Administrator	The Telecommunications Administrator's responsibility is to plan, develop, and implement the Company's telecommunications infrastructure. This includes installing, configuring, maintaining, supporting, and optimizing all telephone systems and services, voicemail and PBX communication systems, and video conferencing environments. The person will also analyze and resolve telecommunications circuit issues in a timely and accurate fashion, and support user needs where required. http://www.infotech.com/research/telecommunications-administrator

Type	Document	Description
	Telecommunications Technician	The Telecommunications Technician's role is to install, support, and maintain in-house voice, data, and video equipment. This includes configuring, diagnosing, repairing, upgrading, and optimizing all telephone systems and services, voicemail and PBX communication systems, and video conferencing environments. The person will also analyze and resolve telecommunications circuit issues in a timely and accurate fashion, and assist all user needs. http://www.infotech.com/research/telecommunications-technician
	IT Architect	The IT Architect's role is to develop and maintain the high-level design plan for the overall logical and technical IT architecture. This individual will provide technical leadership and consulting across the organization, from strategic decision making down to the project planning level. The IT Architect will gain organizational commitment for all high-level infrastructure plans, and initiate and participate in projects to evaluate technologies and methods for implementing these plans. http://www.infotech.com/research/it-architect
	Network Administrator	The Network Administrator's role is to ensure the stable operation of the in-house computer network. This includes planning, developing, installing, configuring, maintaining, supporting, and optimizing all network hardware, software, and communication links. The person will also analyze and resolve end user hardware and software computer problems in a timely and accurate fashion, and provide end user training where required. http://www.infotech.com/research/network-administrator
	Network Manager	The Network Manager's role is to plan, direct, and coordinate the design, installation, and connectivity of computer and network systems to ensure the stable operation of the organization's IT assets. This includes developing, configuring, maintaining, supporting, and optimizing all new and existing network hardware, software, and communication links. The Network Manager will also schedule and direct the activities of a team of network specialists to resolve end user hardware and software problems in a timely and accurate fashion. http://www.infotech.com/research/network-manager
	Network Technician	The Network Technician's role is to support the stable operation of the in-house computer network. This includes planning, designing, installing, configuring, maintaining, and optimizing all network hardware, software, and communication links while ensuring minimal network downtime. The person will also diagnose, resolve, and document hardware and software network problems in a timely and accurate fashion, and provide end user training and support where required. http://www.infotech.com/research/network-technician
	Operations Analyst	The Operations Analyst's role is to ensure that the performance obligations of in-house computing systems are met. This includes gathering and analyzing data in support of systems management, maintenance, and performance. The Operations Analyst is also responsible for generating and compiling reports based on their findings, complete with probable causes and possible solutions to systems issues. This individual will apply proven communication, analytical and problem-solving skills to help identify, communicate and resolve malfunctions and make the appropriate recommendations in order to maximize the benefit of IT systems investments. http://www.infotech.com/research/operations-analyst

Type	Document	Description
	Wireless Network Specialist	The Wireless Network Specialist's role is to ensure the stability and integrity of in-house wireless network services. This is achieved by planning, designing, and developing wireless local area networks (WLANs) across the organization. In addition, the Wireless Network Specialist will oversee the installation, monitoring, maintenance, support, and optimization of all WLAN hardware, software, and communication links. This individual shall analyze and resolve WLAN hardware and software problems in a timely and accurate fashion, and provide end-user training where required. http://www.infotech.com/research/wireless-network-specialist
	Infrastructure Manager	The Infrastructure Manager's role is to plan, organize, and manage staff and overall operations to ensure the stable operation of the organization's IT infrastructure. This includes developing, maintaining, supporting, and optimizing key functional areas, particularly network infrastructure, server infrastructure, data communications, and telecommunications systems. The Infrastructure Manager will also schedule and direct activities to resolve hardware and software problems in a timely and accurate fashion. http://www.infotech.com/research/infrastructure-manager
	Server Administrator	The Server Administrator's role is to design, install, administer, and optimize company servers and related components to achieve high performance of the various business applications supported by tuning the servers as necessary. This includes ensuring the availability of client/server applications, configuring all new implementations, and developing processes and procedures for ongoing management of the server environment. Where applicable, the Server Administrator will assist in overseeing the physical security, integrity, and safety of the data center/server farm. http://www.infotech.com/research/server-administrator
	VoIP Engineer/ Architect	The VoIP Engineer/Architect's role is to coordinate strategies for defining, deploying, and maintaining the company's in-house IP telephony voice communication architecture and its associated network connections and component hardware. This includes managing all engineering projects for VoIP initiatives, planning technology roadmaps, and configuring and optimizing all VoIP/IP-PBX telephone systems and services, both internally and those integrated with Internet-based services. Also, the VoIP Engineer/Architect's mandate will be to maintain SLAs for all organizational IP telephony applications. http://www.infotech.com/research/voip-engineerarchitect
	Network Analyst	The Network Analyst's role is to design, build, and implement network systems across the enterprise. This includes planning, developing, installing, configuring, maintaining, supporting, and optimizing all local and wide area network connections, corporate servers, associated software, and communication links. This person will also troubleshoot network performance issues, as well as analyze network traffic and provide capacity planning solutions. http://www.infotech.com/research/network-analyst
	Telecommunications Analyst	The Telecommunications Analyst's role is to coordinate strategies for - and ensure the integrity of - in-house voice, data, and video equipment and its associated network connections. This includes configuring and optimizing all telephone systems and services, voicemail and PBX communication systems, and video conferencing environments, both internally and those integrated with Internet-based services. Also, the Telecommunications Analyst's mandate will be to maintain SLAs for all organizational telecom applications. http://www.infotech.com/research/telecommunications-analyst

Type	Document	Description
	Network Engineer	The Network Engineer's role is to ensure the stability and integrity of in-house voice, data, video, and wireless network services. This is achieved by planning, designing, and developing local area networks (LANs) and wide area networks (WANs) across the organization. In addition, the Network Engineer will participate with the installation, monitoring, maintenance, support, and optimization of all network hardware, software, and communication links. This individual will also analyze and resolve network hardware and software problems in a timely and accurate fashion, and provide end user training where required. http://www.infotech.com/research/network-engineer

Operating Systems

Type	Document	Description
	Unix Systems Administrator	The Unix System Administrator's role is to operate and tune Unix systems, servers, and related components to ensure high levels of availability and security of the supported business applications. This individual also participates in the planning and implementation of policies and procedures to ensure Unix system provisioning and maintenance that is consistent with company goals, industry best practices, and regulatory requirements. http://www.infotech.com/research/unix-systems-administrator

Project Management

Type	Document	Description
	Global Data Center Director	The Global Data Center Director's role is to focus on the strategic development of all aspects of the global facilities, including managing staffing requirements, optimizing processes and technology, and ensuring a high availability platform. http://www.infotech.com/research/it-global-data-center-director
	Product Owner	The Product Owner is the final authority for decisions regarding priority, business value and functionality for the work done by the Agile development team. http://www.infotech.com/research/it-product-owner
	TechScrum Master	The TechScrum Master facilitates the TechScrum infrastructure support process to improve the responsiveness of infrastructure support and services teams. http://www.infotech.com/research/it-techscrum-master
	Scrum Master	The Scrum Master will be dedicated to a single Scrum team. The successful candidate will be considered a subject-matter expert, have excellent logic and problem solving skills and a drive to make a difference. http://www.infotech.com/research/it-scrum-master

Security

Type	Document	Description
	IT Security Analyst	The IT Security Analyst performs two core functions for the enterprise. The first is the day-to-day operations of the in-place security solutions while the second is the identification, investigation and resolution of security breaches detected by those systems. Secondary tasks may include involvement in the implementation of new security solutions, participation in the creation and or maintenance of policies, standards, baselines, guidelines and procedures as well as conducting vulnerability audits and assessments. The IT Security Analyst is expected to be fully aware of the enterprise's security goals as established by its stated policies, procedures and guidelines and to actively work towards upholding those goals. http://www.infotech.com/research/it-security-analyst
	IT Security Manager	The IT Security Manager performs two core functions for the enterprise. The first is overseeing the operations of the enterprise's security solutions through management of the organization's security analysts. The second is establishing an enterprise security stance through policy, architecture and training processes. Secondary tasks will include the selection of appropriate security solutions, and oversight of any vulnerability audits and assessments. The IT Security Manager is expected to interface with peers in the Systems and Network departments as well as with the leaders of the business units to both share the corporate security vision with those individuals and to solicit their involvement in achieving higher levels of enterprise security through information sharing and co-operation. http://www.infotech.com/research/it-security-manager
	Security Administrator	The Security Administrator's role is to ensure the secure operation of the in-house computer systems, servers, and network connections. This includes checking server and firewall logs, scrutinizing network traffic, establishing and updating virus scans, and troubleshooting. This person will also analyze and resolve security breaches and vulnerability issues in a timely and accurate fashion, and conduct user activity audits where required. http://www.infotech.com/research/security-administrator

Storage

Type	Document	Description
	Storage Administrator	The Storage Administrator's role is to operate and performance-tune storage platforms across the organization to ensure high levels of data quality, availability, and security. This individual also participates in the planning and implementation of policies and procedures to ensure storage provisioning, efficiency, and maintenance that is consistent with company goals, industry best practices, and regulatory requirements. http://www.infotech.com/research/storage-administrator
	Storage Architect	The Storage Architect's role is to plan, design, and analyze the organization's storage infrastructure according to best practices, while ensuring high levels of data quality and availability. This individual will develop, implement, and oversee policies and procedures to ensure consistent storage provisioning, uptime, and regulatory compliance. The Storage Architect is also responsible for capacity planning, backup and restore process design, performance analysis, and developing data disaster recovery plans. http://www.infotech.com/research/storage-architect

Website Development

Type	Document	Description
	Information Architect	The Information Architect (IA) guides projects on their overall high level solution approach, engages with the architecture team, and chairs the formal architecture review and approvals meeting. The IA provides oversight to the portfolio of projects engaged with the architecture team. The IA is the owner of the solution architecture process and solution architecture artifacts. http://www.infotech.com/research/it-information-architect
	User Experience Lead	The User Experience Lead will be responsible for overseeing and contributing to the end-to-end user experience solution designs, ensuring that the user experience vision and goals are achieved. http://www.infotech.com/research/it-user-experience-lead
	Visual Designer	The Visual Designer is responsible for the end-to-end process of transforming complex product requirements into visually stunning and highly functional user interfaces. http://www.infotech.com/research/it-visual-designer
	Web Developer	The Web Developer's role is to build the operations end of the organization's Web sites and keep them running smoothly. This includes designing, building, and implementing new Web pages and sites; integrating sites with back end applications; migrating legacy applications to the Web; and performing day-to-day administration of the organization's Web portfolio. Use of a variety of Web development languages is required. http://www.infotech.com/research/web-developer
	Web Architect	The Web Architect's role is to construct and implement the technical design for the organization's presence on the Internet. This includes the selection of Web applications' hardware and software platforms, developing site navigation, and designing an application framework. The Web Architect is also responsible for ascertaining system volume and analyzing traffic patterns. This individual is sometimes responsible for creating original Web site content. Exceptional knowledge of various Web development languages is required. http://www.infotech.com/research/web-architect

Product Comparisons & Evaluations

Customer Relationship Management for Small Enterprises Research

Type	Document	Description
	Customer Relationship Management: Microsoft Dynamics CRM (Ver. 4 Update)	Microsoft Dynamics CRM is a suite of Customer Relationship Management (CRM) tools focused at small enterprises that need a generic balance among sales, marketing, and service features. Recently, Microsoft released Dynamics CRM Version 4, which represents a complete product overhaul. Companies that are evaluating CRM packages should evaluate this new version of Microsoft Dynamics CRM. http://www.infotech.com/research/customer-relationship-management-microsoft-dynamics-crm-ver-4-update

Predicting the Future

Type	Document	Description
🗋	Special Letter: Next-Generation Memory - Enabling Innovation in Electronics	Member Greg Schmergel discusses a new approach to overcome some of the present-day challenges faced by the semiconductor industry and what is needed to sustain rapid innovation. http://www.infotech.com/research/special-letter-next-generation-memory-enabling-innovation-in-electronics
🗋	What's Behind Social?	It's no secret that, for much of the world today, governments are broken, economies are struggling, and unemployment among the young is in the 25%-50% range. Among other things, this is a clear recipe for global revolution. http://www.infotech.com/research/what-s-behind-social
🗋	The Future of Consumer Electronics and the Big Shift: Margins vs. Innovation	If there is a single person in the world who represents the cutting edge of consumer technology -"and the forces that drive the many markets involved" – it is Gary Shapiro. As the head of CEA's International Consumer Electronics Show (CES), he provides the largest platform in the world for entrepreneurs and companies to test and sell their latest, most innovative products. http://www.infotech.com/research/the-future-of-consumer-electronics-and-the-big-shift-margins-vs-innovation
🗋	Hitting Their Own Walls: The Telecom Struggle	A funny thing happened to South Korea's march toward total domination of the cellphone market: it ran into its own business model, on a much larger scale. A decade or so ago, back when Samsung was No. 5 in the global market, members read here that it would soon become No. 1. Well, as anyone following the company's financials and press will already be aware, Samsung - and fellow South Korean handset makers LG and, in a different way, Pantech - has just run into a buzz saw called China. http://www.infotech.com/research/hitting-their-own-walls-the-telecom-struggle
🗋	Special Letter: Innovations in Cyber Security -" An Emerging New Paradigm	In this Special Letter, you will see the idea of Internet security applied to cloud security and data protection. To my mind, getting this project done is of the same priority as replacing firewalls and virus lists with heuristic tools for monitoring network penetrations, and convincing CEOs to wake up and take serious action on security (since today their "in-denial" approach is killing their companies). http://www.infotech.com/research/special-letter-innovations-in-cyber-security-an-emerging-new-paradigm
🗋	The Big Shift, Part II	In his original predictions regarding the Big Shift (The Big Shift, August 12, 2013), Mark Anderson described the effects of the commercial pressures flowing out of China's national business model (and, to a lesser degree, those of South Korea and Japan) on future sales of technology hardware. In this issue, we'll look at another aspect of this tectonic shift in markets and shares. Now, we'll be interested not in the national business models driving these trends, but in demographics, which are the second most powerful set of influencers in product acceptance. http://www.infotech.com/research/the-big-shift-part-ii
🗋	The India Report: Mr. Modi's India	In this issue, Asia Editor Rafiq Dossani brings us a no-holds-barred view of exactly how the election was won, who really is in charge today in India, and what we should expect of the new prime minister - and those who helped put him there. http://www.infotech.com/research/the-india-report-mr-modi-s-india
🗋	Software Quality vs. Screen Size	The energy, effort, funds, and intelligence of the world's software engineers are increasingly being focused on micro-apps. After all, as everyone knows, that's where the action is. http://www.infotech.com/research/software-quality-vs-screen-size

Type	Document	Description
🗋	Looking Further: Neal Stephenson	Almost all great leaps in science and technology seem to be foreshadowed in great works of science fiction. For that reason, we bring the best writers of science fiction to our FiRe Conference every year and ask them to tell us what's coming. Each year this conversation becomes more compelling, and this year's discussion with David Brin and Neal Stephenson was definitely one of those peak experiences. http://www.infotech.com/research/looking-further-neal-stephenson
🗋	Jeff Bezos in His Prime	How far will Amazon go, and in which directions? We all want to know, and no one seems to. It might help if we try to track this bipolar axis, starting with Jeff and working through his own light-bulb moments as the business model expanded. http://www.infotech.com/research/jeff-bezos-in-his-prime
🗋	Asia Letter, Q3 2014	More often than not, the trends and investments happening in Asia take months or years to show up in volume in the US. Certainly this is true for hydrogen infrastructure and fuel-cell vehicles. We've been covering Japan's (and now South Korea's) stealth strategy on this rollout for almost a decade; now it's happening in real time, according to Asia Editor Scott Foster in this week's issue. http://www.infotech.com/research/asia-letter-q3-2014
🗋	Commercial Surveillance	Which are you more concerned about spying on you and your data: national intelligence agencies or corporations? If national intelligence agencies have access to virtually everything gathered by social media sites, why would you view these social media sites any differently than you view the agencies, in terms of privacy? http://www.infotech.com/research/commercial-surveillance
🗋	Learning from the Leaders: Michael Dell and Mark Hurd	One of the most enjoyable benefits I get from my work is the chance to talk with some of the great technology and business leaders of our time. In my view, our members Michael Dell and Mark Hurd are at the top of this list, together with long-time member Elon Musk of SpaceX and Tesla Motors fame. http://www.infotech.com/research/learning-from-the-leaders-michael-dell-and-mark-hurd
🗋	FiRe 2014 in Review	Each year we wrestle with the question of how best to bring the life-changing experiences of the Future in Review Conference to all of our members. This week's issue is perhaps the closest we have come yet, with a variety of media and linked sources, and most, if not all, of the bloggers working with us that week. http://www.infotech.com/research/fire-2014-in-review
🗋	Special Letter: Decoding DNA -" The Other 97%, in Real Time	This week's issue is an absolute Must Read for anyone interested in the future of genetics, healthcare, biomedicine, and related issues. If you need to understand how DNA works, and - more important from a pragmatic perspective - how our current techniques fail to reveal real DNA sequences, and how to fix the problem, read on. http://www.infotech.com/research/special-letter-decoding-dna-the-other-97-in-real-time
🗋	The Real Security Problem: People	-‹The collapse of the old-style security firms that we predicted a few months ago is now well under way, with the largest of these talking publicly about the demise of their own model. http://www.infotech.com/research/the-real-security-problem-people

Type	Document	Description
🗋	Special Letter: The Second Internet Revolution - Bringing Democracy Up to Speed	This week's issue describes how we might bring elections and voting into the 21st century, enabling increased fairness and objectivity in the ongoing struggle for real democratic government. http://www.infotech.com/research/special-letter-the-second-internet-revolution-bringing-democracy-up-to-speed
🗋	The Internet of Other Things	There is no question that the large ship of technology funding and planning has shifted toward the Internet of Things. From the smallest start-ups (remember cute little NEST?) to the largest IT companies in the world, the IoT has taken front-and-center interest among those planning on making near-term profits as every possible device becomes smart and connected. http://www.infotech.com/research/the-internet-of-other-things
🗋	The Internet of Things Is Really the Internet of People	Mark Hurd goes beyond the Big Data discussions we've all read to an on-the-ground series of examples of what the new Internet of Things will mean in real business settings, and - most interesting of all - handled by real people. http://www.infotech.com/research/the-internet-of-things-is-really-the-internet-of-people
🗋	Science into Technology	From genetics to healthcare, materials science to advanced weapons, the new announcements in scientific exploration and technical deployment are speeding up, not slowing down. http://www.infotech.com/research/science-into-technology
🗋	Ideas into Actions: Part II	I like problems. And this is probably the biggest problem that humanity faces right now. One reason it's a problem is because it's complicated. Another reason it's a problem is because of the political issues involved with who's on what side. So it's very likely, going the way we're going, that we could talk this thing to death and still have a horrible experience. And not fix it in time. http://www.infotech.com/research/ideas-into-actions-part-ii
🗋	Ideas into Actions: Part I	In the first evening of this series we discuss some of the major themes we have been working on, with a focus on genetics, healthcare, computing, education, and other topics. http://www.infotech.com/research/ideas-into-actions-part-i
🗋	FiRe 2014: The Inventions and Trends We're Watching	Here is a selection of what we will be talking about, and doing, at FiRe 2014, with a few words on the trends behind them and why we picked them. http://www.infotech.com/research/fire-2014-the-inventions-and-trends-we-re-watching
🗋	Asia Letter, Q2 2014	This week, Asia Editor Scott Foster takes a close and detailed look at country plans and hopes in the worlds of sustainability and energy, from vendor to customer, supply source to demand center. http://www.infotech.com/research/asia-letter-q2-2014
🗋	The New INSecurity and INVNT/IP	The nation-sponsored cyber attacks on US corporations are not the result of a purely military plan, but of a new national business model. http://www.infotech.com/research/the-new-insecurity-and-invnt-ip
🗋	Special Letter: The Impact and Evolution of Mobile Communications	Mobile now drives almost every part of the computing and communications product portfolio, and those who wish to get a deeper understanding of its direction will be glad they read this week's issue. http://www.infotech.com/research/special-letter-the-impact-and-evolution-of-mobile-communications

Type	Document	Description
🗋	Balkanizing the Net: Benefits and Costs	When politicians from democratic countries first considered the effects of the Net on China, their naive assumption was that more information would be brought into this closed society, and thereby increase the ultimate chances for democracy and free speech. http://www.infotech.com/research/balkanizing-the-net-benefits-and-costs
🗋	The India Report: Politics and Bollywood	Rafiq Dossani takes on the politics of the coming Indian election and makes it all make sense, while providing the inside view of India's most consistent traditional revenue source, Bollywood. http://www.infotech.com/research/the-india-report-politics-and-bollywood
🗋	Satya's Challenge: What Microsoft Faces	The problem for Microsoft has never been making money; Steve Ballmer proved that beyond a doubt. Rather, the company's historic challenge has been to convince investors that a fast- (or slow-) follower business model deserves increasing valuations. http://www.infotech.com/research/satya-s-challenge-what-microsoft-faces
🗋	Special Letter: Looking Further: Much Better, or Much Worse, in 20 Years?	In this conversation from FiRe 2013, David and Brenda do just that, in one long series of brilliant (and often surprising) insights into the brutal truth of who we are, and the informed vision of where our natures will take us -" science and all. http://www.infotech.com/research/special-letter-looking-further-much-better-or-much-worse-in-20-years
🗋	E-Commerce in Crisis	A funny thing happened on the path to putting all business and banking online: the same access that makes it attractive to E-Commerce vendors and customers makes it even more attractive to thieves. We're approaching a moment when the question of which group shares more risk, and which benefits most, is flipping. http://www.infotech.com/research/e-commerce-in-crisis
🗋	A Conversation About MALT, Part II	In our -‹first transcript on MALT, we laid the foundation for the concept that the smartphone platform is the most important real estate in technology. Here, in the second part, we address how this integrates with the details of our MALT concept. http://www.infotech.com/research/a-conversation-about-malt-part-ii
🗋	A Conversation About MALT	This week I am pleased to share a private transcript of my recent conference call with UBS and selected clients, in which we take a deeper dive into the MALT (Micromapping, Advertising, Location and ID, and Transaction) technology vision / business opportunity set, and into the thinking around the 2014 Predictions. http://www.infotech.com/research/a-conversation-about-malt
🗋	The Future of Bitcoin	If you've never heard of Satoshi Nakamoto, that's no excuse, even if the likelihood of his existence is close to zero. There is an exponentially growing crowd of investors in the Bitcoin system who hope - and perhaps believe - that this digital currency will prove more substantial than the pseudonymous name of its inventor. http://www.infotech.com/research/the-future-of-bitcoin
🗋	Top Ten Predictions for 2014	It is that time of year again: we've just returned from our annual Predictions Dinner in New York, and I'd like to share my predictions for the coming year with our members. http://www.infotech.com/research/top-ten-predictions-for-2014

Type	Document	Description
	Asia Letter, Q1 2014	In this quarter's report, Asia Editor and Ambassador Scott Foster has found some delightful nuggets that reveal planet-scale stories just under the ground. The departure of chip dominance from Japanese shores, a half-century after taking the tech from Intel and kicking it out of the business, is a mammoth event. More important to the Japanese themselves: losing this edge, in equipment and chips, has to be a blow to many future domestic business plans. http://www.infotech.com/research/asia-letter-q1-2014
	MALT: A New Killer Category	There is an entirely new category of wireless smartphone applications about to be launched, with the potential of making staggering amounts of money. What is this new category all about, and how and why is it different from what we are using today? http://www.infotech.com/research/malt-a-new-killer-category
	Wireless AORTA: The Fourth Place	There are many times when technological change brings unintended consequences. As we move into an era of very high bandwidth everywhere, everything is about to change. http://www.infotech.com/research/wireless-aorta-the-fourth-place
	Special Letter: Finding Security in the Cloud	Today, everyone is talking cloud computing, but the issue of security continues to drive the conversation around corporate adoption. While it is obvious that start-ups have terrific benefit in public cloud use through scalability, it is equally obvious that Fortune 500 firms are not putting their crown jewels into someone else's hands. http://www.infotech.com/research/special-letter-finding-security-in-the-cloud
	Q4 2013: The Christmas Quarter	Every year, we put out an issue on what to expect in the fourth quarter, the most important in the year to technology executives and the investors who follow them. http://www.infotech.com/research/q4-2013-the-christmas-quarter
	Special Letter: Big Data Strategy and Insights	Everyone talks about Big Data these days, but this is almost always a conversation about what it is, how to mine it, how to make more money from it, and how to get even more data into the mix. http://www.infotech.com/research/special-letter-big-data-strategy-and-insights
	The Mobile Global Computer	We have just built the world's most powerful computer, but no one has used it yet. What is even more amazing: no one even knows it exists. http://www.infotech.com/research/the-mobile-global-computer
	The Right Idea	This week's issue is the direct result of my recent speech to the incoming class of Thunderbird School of Global Management, virtually all of whom then signed up as our members. http://www.infotech.com/research/it-the-right-idea
	Asia Letter, Q4 2013: Abenomics Update	Most smart international observers have been puzzled by Japan's economic behavior over the last few decades. The country was supposed to be in recession, but didn't really seem to be. Now, with the advent of Abenomics, the economic hoi polloi are mostly praising the results of increased spending, without being too critical of how it works in the long run. http://www.infotech.com/research/it-asia-letter-q4-2013-abenomics-update
	Special Letter: Solving the IP Crisis and Enabling Global Economic Growth	I think this issue, and the IP Commission Report behind it, should be required reading for every CEO whose company depends upon technological advance. http://www.infotech.com/research/it-solving-the-ip-crisis-and-enabling-global-economic-growth

Type	Document	Description
🗋	Special Letter: India's Challenge	Today, we are seeing a free-fall in many currencies, with India in every day's lead news. Luckily for us, Rafiq Dossani has again delivered a timely insider-view of this cascade of events and their local causes. http://www.infotech.com/research/it-special-letter-indias-challenge
🗋	The Next Assistant	Welcome to the next virtual assistant, or what our members would call Internet Assistant III. What is IA III, and why is it/he/she different from past versions? http://www.infotech.com/research/it-the-next-assistant
🗋	Special Letter: All Your Data Is Being Stolen As You Read This	In this week's Special Letter, long-time member and serial Valley entrepreneur Kevin Surace describes this problem in clear detail. http://www.infotech.com/research/special-letter-all-your-data-is-being-stolen-as-you-read-this
🗋	The Big Shift	The world economy, based in the post-Information Age on invention, is moving to models based on copying and theft. This is happening not in single product lines or economic sectors, but across the entire globe, from agriculture to medicine, from personal computers to phones, from online companies to software firms. http://www.infotech.com/research/it-the-big-shift
🗋	Security vs. Technology: The Aspen Experience	I have just returned from attending two back-to-back conferences at the Aspen Institute. And while there were great leaders and fascinating people at both affairs, one had the distinct feeling of a certain kind of dislocatedness from reality. The Security Forum's agenda and speaker list were heavily leveraged toward fighting "the last war" - i.e. terrorism. At Brainstorm, the lack of understanding for the need for increased security was not only palpable, but it was also almost discouraged. Other than that, both were great shows. http://www.infotech.com/research/security-vs-technology-the-aspen-experience
🗋	Safety on the Net: Authentication, Pseudonymity, and Resilience vs. Increasing Threats	Vint Cerf, Google's Chief Evangelist and the "Father of the Internet," joins his long-time friend Larry Smarr, himself one of the technology heroes of the age, onstage for a conversation at the 2013 FiRe Conference. http://www.infotech.com/research/it-safety-on-the-net-authentication-pseudonymity-and-resilience-vs-increasing-threats
🗋	Redesigning Television: Part II	In Part I of this two-part series, we looked at the current television landscape: who views, using what devices; who pays for advertising, in what sectors; what today's hardware and software offerings are; how much money is involved in the industry. http://www.infotech.com/research/it-redesigning-television-part-ii
🗋	Redesigning Television: Part I	Television is in the middle of a revolution. But given this undeniable fact, it is remarkable how little television has changed in the last few decades. Even when the world's most amazing change artists (Steve Jobs, for instance, or Google, or Amazon) have taken a run at this issue, not much has changed. http://www.infotech.com/research/it-redesigning-television-part-i
🗋	Zero Loss: The FiRe CxO IP Checklist	For corporate executives, security is no longer a security issue; it's an economic imperative. The theft of their secrets can destroy their flagship product line, their company, or even their whole economic sector. http://www.infotech.com/research/it-zero-loss-the-fire-cxo-ip-checklist
🗋	Global Report on Asia, Q3 2013: What It Takes	We are now seeing a massive shift in investment into the ASEAN region. As recently as five years ago, these funds would have flowed almost entirely to China. http://www.infotech.com/research/it-global-report-on-asia-q3-2013-what-it-takes

Type	Document	Description
	Behind the Snowden Patterns	Here are the major patterns involved in the stories regarding leaks by Booz Allen Hamilton contractor Edward Snowden, now residing in Hong Kong. I will say at the beginning: this is not an attempt to assess guilt, forgive or praise behavior, discuss legalities or ethics, or in any way judge Edward Snowden or his actions. I hope that by sharing patterns that are meaningful, others may come to their own conclusions. http://www.infotech.com/research/it-behind-the-snowden-patterns
	Five Major Trends	There are a handful of major trends that are driving the world today, above and beyond all others. For that reason, rather than writing about sub-trends in this issue, I thought enough of these had become evident that sharing them would be helpful. http://www.infotech.com/research/it-five-major-trends
	The Top 10 Things You Would Have Learned at FiRe 2013	Discover some of the highlights from the 2013 Future in Review Conference, including developments in P4 medicine and personal diagnostics, prevention of IP theft, views on education, the fight against CO2, Big Data vs. Massive Analysis, and more. http://www.infotech.com/research/it-the-top-10-things-you-would-have-learned-at-fire-2013
	Special Letter: Enabling the Smart Grid with Massive Storage	The lobbyists for coal, oil, and natural gas may control the halls of power today, but if their bosses don't properly review "what business are we in" and come up with a new answer involving alternative energy and no more CO2 emissions, they will be perceived by following generations as perhaps the most destructive organizations of all time. http://www.infotech.com/research/it-special-letter-enabling-the-smart-grid-with-massive-storage
	Inside FiRe	Whether your interest is in chips, software, massive data, analytics, data visualization, cloud computing, security, IP theft and protection, technology markets, international trade, or global economics, FiRe has consistently focused on problems (and solutions) that, usually years later, became mainstream. http://www.infotech.com/research/it-inside-fire
	When Windows Tanks	I recently found myself asking fellow panelists at an MIT Forum what would happen if Windows 8 just didn't take off. There was a conversational pause, so I asked again. No takers. Perhaps it was because we were in Seattle, but no one wanted to talk about the elephant in the room. http://www.infotech.com/research/it-when-windows-tanks
	Special Letter: Mobile Voice and Natural Language Understanding	If there is one technology in the world which would seem to hold the key to liberating the human-compute connection, it is voice recognition. http://www.infotech.com/research/it-special-letter-mobile-voice-and-natural-language-understanding-revolution-or-evolution
	Platform Wars: Who Wins	This circus-like competitive swirl is not about who has the coolest widget. It is only, and all, about whose business model best fits the markets and the offerings. http://www.infotech.com/research/it-platform-wars-who-wins
	Six Smartphone Killer Apps	Killer apps are applications that are so compelling that they either amplify or defy the rules above, driving huge market share to the platforms where they appear. http://www.infotech.com/research/it-six-smartphone-killer-apps
	Asia Letter, Q2 2013: Japan Back In Gear	Shortly after the Great East Japan Earthquake and Fukushima nuclear disaster, I received an email from a friend in Canada wondering if the Japanese could ever get over the shock, and if their faith in technology could survive. Two years later, the answers are "Yes" and "Yes." http://www.infotech.com/research/it-asia-letter-q2-2013-japan-back-in-gear

Type	Document	Description
🗋	Smartphone OSs: The Inventors Lose Control	The smartphone OS is the most strategic real estate in the world today, the low-bank waterfront (in a pre-global warming sense) of the technology real estate portfolio. http://www.infotech.com/research/it-smartphone-oss-the-inventors-lose-control
🗋	Special Letter: Gaps in Our Near-Future Agenda	The future is a vast, unruly work-space, so let's focus on the near-term realm of immediate opportunity. http://www.infotech.com/research/it-special-letter-gaps-in-our-near-future-agenda
🗋	What Mandiant Brings	Last week, while our team was meeting with the top intelligence and cyber officials of the UK, the Mandiant Corporation released a report that changed the global balance of power, and, hopefully, the future of the global economy. http://www.infotech.com/research/it-what-mandiant-brings
🗋	Special Letter: Disrupting Markets with Big Data and Collective Impact	Business leaders may be averse to the word "collective" because it often has the word "bargaining" next to it. But this type of systems thinking is powerful when considered as franchising or partner/reseller marketing. http://www.infotech.com/research/it-special-letter-disrupting-markets-with-big-data-and-collective-impact
🗋	International Challenges to Innovation Protection	I believe that everyone needs to hear Sir Richard's thoughts and cautionary comments on the subject of the Chinese People's Liberation Army attacking commercial and government cyber targets, and the recent Mandiant announcements simply underline the importance that every corporation now take real steps to stop this unbelievable and unsustainable level of IP loss. http://www.infotech.com/research/it-international-challenges-to-innovation-protection
🗋	The Most Important Chip Not Yet Invented	If pattern recognition is such a key tool in seeing the world clearly, how is it that we have not invented a chip to do this yet? http://www.infotech.com/research/it-the-most-important-chip-not-yet-invented
🗋	Resisting Chaos	The lower the rate of change of a complex platform, the greater the species diversity and number of non-platform entities that benefit from it. http://www.infotech.com/research/it-resisting-chaos
🗋	Special Letter: Graphene and Global Warming	If we're right about the potential of graphene, it will be the building block with which a very large part of the future world is created. http://www.infotech.com/research/it-special-letter-graphene-and-global-warming
🗋	The Geographical Fate of Personal Computers	It is quite likely that personal computers, the technology entry point for a gigantic technological ecosystem, will no longer be made in the United States; their country of invention, and, for decades, their largest market. This thought is at once so shocking, so important, and so likely that I thought we should explore it in this week's Report. http://www.infotech.com/research/it-the-geographical-fate-of-personal-computers
🗋	Special Letter: India in 2013	The U.S. National Intelligence Council (NIC) predicts that India's contribution to global growth in the next 15 to 20 years will surpass that of any other individual advanced economy except the United States. http://www.infotech.com/research/it-special-letter-india-in-2013

Type	Document	Description
🗋	The Globalization Issue: Labor vs. Intellectual Property	The rationale for making phones in China for Western markets was the motivation behind all Globalization moves: cheaper labor. This is a transitional time, when original reasons for offshoring are declining and issues such as the protection of Intellectual Property, are becoming more importance. http://www.infotech.com/research/it-the-globalization-issue-labor-vs-intellectual-property
🗋	The Globalization Issue: Labor vs. Intellectual Property (Continued)	The rationale for making phones in China for Western markets was the motivation behind all Globalization moves: cheaper labor. This is a transitional time, when original reasons for offshoring are declining and issues such as the protection of Intellectual Property, are becoming more importance. http://www.infotech.com/research/it-the-globalization-issue-labor-vs-intellectual-property-continued
🗋	Asia Letter, Q1 2013: Japan-India Cooperation	For almost a decade now, we have been writing about the economy called "ChinaPan": the interesting duopoly created with Japan's capital, China's workforce, and a shared and competitive mercantilist national business model. Those days are over. http://www.infotech.com/research/it-asia-letter-q1-2013-japan-india-cooperation
🗋	Global Landscapes in 2013: Technology and the Economy	This year, the Ten Predictions, which are meant to stand in specifics, are separated, word for word; from the technology and economic landscapes on which they will play out. http://www.infotech.com/research/it-global-landscapes-in-2013-technology-and-the-economy
🗋	Top Ten Predictions for 2013	The theme of 2013: major market shifts against a stable background. The top ten technology predictions for the coming year. http://www.infotech.com/research/it-top-ten-predictions-for-2013
🗋	The World According to IP	Behind all of the economic shifts and dislocations, the stock market moves, the earnings disappointments in tech, job losses and unemployment, asymmetric trade and trade balances, military shifts and what pays for them, we have one major story: the creation of inventions, and how wealth flows from them. http://www.infotech.com/research/it-the-world-according-to-ip
🗋	Special Letter: Quantifying Touch - Saving Lives While Growing Profits	There is perhaps nothing simpler in the human experience, nor more connecting, than touch. As Davis says in this letter, we use touch to measure many things on a daily basis, and recruit other senses as surrogates when we have to. Touch is, in a very material (and perhaps force-field interpretation) way, the ultimate sense. http://www.infotech.com/research/it-special-letter-quantifying-touch-saving-lives-while-growing-profits
🗋	The Christmas Quarter	In most years, I write about Q4 a bit earlier. After all, it is the most important quarter to those in technology, and to those watching the general economy. But this year was an election year in the U.S., so I took a pass until that was complete. http://www.infotech.com/research/it-the-christmas-quarter
🗋	Privacy Protection: Going Global	Privacy regulations are about to become one of the great constraining forces on e-commerce, and one of the final legal bastions of personal protection for individuals, whether one lives in the E.U., the U.S., or elsewhere. http://www.infotech.com/research/it-privacy-protection-going-global

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🗋	American Broadband Acceleration	Until the advent of 4G LTE in the wireless arena, the U.S. ranked around 23rd in the annual OECD broadband penetration schedule. With the early advance in LTE vs. its global competitors, all of the tables have turned, and I would now put the U.S. in the top five. http://www.infotech.com/research/it-american-broadband-acceleration
🗋	Special Letter: Capability Leverage	Capability leverage is made possible when diverse parties, from individuals and small firms to large incumbents, and even cities, form ongoing and mutually beneficial relationships with one another. http://www.infotech.com/research/it-special-letter-capability-leverage
🗋	Connecting Digital Earths	People have been talking about so-called M2M communications for quite a while, but it seems as though we haven't really gotten our arms around it yet. http://www.infotech.com/research/connecting-digital-earths
🗋	Asia Letter, Q4 2012: The Canada of Asia?	The economic integration of Eastern Russia with China, Korea, and Japan will strengthen all four countries. The primary threats to this optimistic scenario are politicians and economic slowdown in China. http://www.infotech.com/research/it-asia-letter-q4-2012-the-canada-of-asia
🗋	Special Letter: A Contract with the Ocean	How many of the solutions we currently envision address only the land? As we improve our science, and alert the human population to the benefits of seeing the Ocean as a long-term life support system this is a perfect time to stop waiting for change. http://www.infotech.com/research/it-special-letter-a-contract-with-the-ocean
🗋	Production vs. Consumption: Computer Sales Explode!	Wherever one turns these days, from Steve Jobs' quotes and Apple releases to Intel's earnings projections, the same headlines leap out: "PC Sales Decline," "Computer Sales Falling," "PC Chip Sales in Tailspin," and so on. If you weren't paying attention, you might think the computer industry had hit a headwind. http://www.infotech.com/research/it-production-vs-consumption-computer-sales-explode
🗋	Chinese Banks: An Economic Fantasy?	The economic rise of China is the most important financial event in this century. What if it, like so many other Chinese products, is counterfeit? http://www.infotech.com/research/it-chinese-banks-an-economic-fantasy
🗋	Online Business Models	There is a new verb in the English language, which no doubt haunts the memories of both Facebook IPO participants: "You have just been Zucked." The pain of this investing debacle has spread to essentially all social networking valuations, and not for bad reasons: the emperor had no clothes. http://www.infotech.com/research/it-online-business-models
🗋	Mark Anderson's Programme in Technology and the Economy	It is now well-known that virtually all trained economists missed predicting the most important (and large-scale) economic event of the last 50 years: the current decline now called the Global Financial Collapse. http://www.infotech.com/research/it-mark-andersons-programme-in-technology-and-the-economy
🗋	Special Letter: Decoding Animal Languages	This week's Special Letter is focused on a discovery which deserves much more attention than it has received to date. Thanks to author Con Slobodchikoff, humans have, for the first time, found a new technology for understanding the language of a different species. http://www.infotech.com/research/it-special-letter-decoding-animal-languages
🗋	The Telequipment Sector: A Lesson in Economic Destruction	There was a time in human memory when Lucent was the big kid on the block. A hot company, a hot stock to own, run by some very savvy executives. http://www.infotech.com/research/it-the-telequipment-sector-a-lesson-in-economic-destruction

Type	Document	Description
	Education Beyond Technology	Today, at a time when the incorporation of basic internet connection technology in K-12 schoolrooms is accepted as a "When, not if" proposition, almost all of the conversation remains focused on the bits and bytes. Which laptop? Which router? Which parental/teacher-control software? Which sites should be blocked? And while all of these are important tactical questions (a few of which I'll touch on here), it seems this would be exactly the right time for the world to be looking beyond the minutiae, toward comprehending and embracing a completely new vision of both education and its result. http://www.infotech.com/research/education-beyond-technology
	Asia Letter, Q3 2012: Nuclear Summer	In early May, the last of Japan's 54 nuclear reactors was shut down for inspection. On July 1, the No. 3 reactor at the Oi nuclear power plant, located on the Japan Sea opposite Osaka, was restarted. http://www.infotech.com/research/it-asia-letter-q3-2012-nuclear-summer
	Zero Footprint: A New Model Linking Energy and Materials	A few years ago, I had the honor of keynoting a Warburg Pincus conference on energy in Houston, Texas. I told this group of oil and gas executives that they had to re-assess what business they were in: not drilling and selling petroleum products, which was a mid-term game at best. Rather, I suggested they were in the business of selling carbon's covalent bonds. http://www.infotech.com/research/it-zero-footprint-a-new-model-linking-energy-and-materials
	Device Battles, IP Wars	Apple is a much more interesting company than most people realize. While the public remains fascinated with how cool its designs are, and the increasing cult appreciation surrounding founder Steve Jobs, almost no one is paying attention to Apple's - and Jobs' - pioneering battle with Asian manufacturers. http://www.infotech.com/research/it-device-battles-ip-wars
	Technology Driving the Economy: The Dark Side	We are now at a point in the story of our global economy when we must pass a test. Since it is clear that those with power and money cannot regulate themselves, and that those with power and money will use them to avoid regulation, how do we go forward? http://www.infotech.com/research/it-technology-driving-the-economy-the-dark-side
	A Centerpiece Conversation with Mark Hurd; "The New Frontier: Simplify IT"	Mark Hurd and I have had a longstanding friendship, beginning with his time as CEO of Hewlett-Packard. Before we met, I was already working with NCR and Teradata, his home country at the time, because I saw what Teradata could bring, in the world of high-performance computing, to the industry. http://www.infotech.com/research/it-a-centerpiece-conversation-with-mark-hurd-the-new-frontier-simplify-it
	Defining Perfection in Human/Computer Interaction or Why I Sold My Apple Stock	In a number of issues in the last few months, I have suggested that Apple would be a Sell. I thought (and still think) that the stock would continue to rise for up to two years after Steve's death, but that selling was now a When rather than an If. For me, that When came about three weeks ago -- just before the last big Dow decline. http://www.infotech.com/research/it-defining-perfection-in-humancomputer-interaction-or-why-i-sold-my-apple-stock
	FiRe X: Highlights and Achievements	With five new Global Initiatives under way, FiRe X was again the best FiRe yet. While our teams continue to work on these new projects, it's already time to start planning FiRe 2013. We hope to see you there. http://www.infotech.com/research/it-fire-x-highlights-and-achievements

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🗋	Update: Asian Shifts	In the last week or so, several major events have transpired involving Asia, which will likely have impact on global markets for technology and other products. http://www.infotech.com/research/it-update-asian-shifts
🗋	CO2 as Cash Crop: A Second Look at Algae	How do you change the world with pond scum? The answer is simple: there is no more efficient source of sustainably produced food, feed, chemical, and energy products available on the Earth today. http://www.infotech.com/research/it-co2-as-cash-crop-a-second-look-at-algae
🗋	The Trends Driving FiRe X: Part II	In the first part of this discussion, I looked at the trends behind the opening session conversations at this year's Future in Review Conference. The trends I'll discuss in this week's issue tend to be broader in scope, and occasionally deeper (i.e. a bit further out) in time or subject space. http://www.infotech.com/research/it-the-trends-driving-fire-x-part-ii
🗋	The Trends Driving FiRe X: Part I	In the overlap of technology and economics, we are describing a new regime of thought and action which we think is necessary for the global system to continue its growth. http://www.infotech.com/research/it-the-trends-driving-fire-x-part-i
🗋	Special Letter: Robots as Solutions	Understanding the needs of society, as opposed to showcasing feats of technology, is pivotal to the long-term success of the robotics industry. While hundreds of millions of dollars have been spent on cool robotics demonstrations, the industry as a whole has put relatively little toward solving the high value needs of businesses and consumers. http://www.infotech.com/research/it-special-letter-robots-as-solutions
🗋	Asia Letter, Q2 2012: One Year Later	From the deeply personal to the public governmental and business reactions to this cascade of tragedies, the Japanese have quietly shown the world how to deal with adversity. At the same time, inadvertently, this period has given us a chance to acquire a deeper understanding of these levels of enterprise that we otherwise might never have seen. As always, our Asia Editor Eric Grant has provided an insight into what is real about these responses, from an on-the-ground perspective, which I find invaluable. I have little doubt that our members will, too. http://www.infotech.com/research/it-asia-letter-q2-2012-one-year-later
🗋	Huawei, Part 2	Last week, we offered the first part of a detailed look at what may be the most important company in the world - not solely because of its strategic positioning in core communications markets, nor because of its amazing growth story, but rather because it is the most successful representation of what the world may expect in the future of the Chinese national business model. Study Huawei carefully if you want to understand China's future. http://www.infotech.com/research/it-huawei-part-2
🗋	Huawei, Part I	This week we offer the first part of a detailed look at what may be the most important company in the world - not solely because of its strategic positioning in core communications markets, nor because of its amazing growth story, but rather because it is the most successful representation of what the world may expect in the future of the Chinese national business model. http://www.infotech.com/research/it-huawei-part-i
🗋	Investing in India	After a few decades of unbridled growth, the economic powerhouses of Asia are beginning to encounter self-imposed limits that will drop their GDP figures by perhaps 20%-30% in the near term. These limits include, but are not limited to, top-down spending controls in China and the ever-present bureaucratic interference so long a hindrance in India. http://www.infotech.com/research/it-investing-in-india

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🗋	The Power of Integration	There are many times when it is difficult to appreciate how essentially stupid - and technically primitive - our computing tools are. http://www.infotech.com/research/it-the-power-of-integration
🗋	Understanding and Integrating Evolution	Evolution is the most successful design and creation process on the planet. For those involved in technology products, this realization provides a perfect classroom experience. http://www.infotech.com/research/it-understanding-and-integrating-evolution
🗋	A Radical New Model for Startups	This week's Special Letter breaks one of our cardinal rules right out of the gate: until now, we have never allowed companies to talk much about themselves or their products. Why the change here? Because Mobisante is in the midst of experiencing a new set of rules, pressures, successes, and opportunities as a startup, and this account would make no sense whatsoever without details and the "war story" aspects of really being there that CEO Sailesh Chutani has provided for us. http://www.infotech.com/research/it-a-radical-new-model-for-startups
🗋	Human Limits, Machine Ambitions	We each have a job to do in this world of technology driving economics, and, for the most part, it's head-down and incremental improvements that define our days. But there is another level of dreaming, designing, and engineering that takes humans, and increasingly machines, to a completely different plane of thought and experience. http://www.infotech.com/research/it-human-limits-machine-ambitions
🗋	Making Accurate Predictions	Around us, we see Europe disintegrating, currencies manipulated, a cleanly split U.S. economy (predicted a year before it happened), and the dramatic rise in tension between China and the U.S. caused by the former's organized theft of Intellectual Property. http://www.infotech.com/research/it-making-accurate-predictions
🗋	A Consumer's Guide: Forecasting Futurism in the Age of Information Glut	In this week's Special Letter, well-known publishing expert Thad McIlroy attacks the question of one's choices regarding prediction when faced with more data than can be absorbed by one person. It's an important question: do regular folks (i.e., smart people who do something else for a living) just give up on knowing what's coming next, or (no joke intended) do they just buy this newsletter? http://www.infotech.com/research/it-a-consumers-guide-forecasting-futurism-in-the-age-of-information-glut
🗋	The Value of Supply Chains	These days I have almost no use for politics; I consider those who believe in Party Before Country as likely to be guilty of treason, and my younger-year dreams of public service in elected office have been replaced, in general, with a deep cynicism of corrupt lobbyists buying favors from corrupt representatives. And yes, there are a few exceptions. http://www.infotech.com/research/it-the-value-of-supply-chains

Type	Document	Description
	It's the Network	It's easy to understand why so many people have thus far missed the significance of the subject of this week's discussion. After all: - We've all just come back from a CES show that spent all of its pomp on devices, and almost not a whisper on bandwidth; - We are the victims of so much fraud at the hands of the carriers that it's impossible to get excited about, or even believe, anything having to do with them; - The world seems pretty set in its big-trend ways, so what's new to get excited about? But wait! The world is about to change. Welcome to the world of LTE - a world that none of us is really expecting, or is prepared for. http://www.infotech.com/research/it-its-the-network
	How Intellectual Property Drives the Global Economy: A Centerpiece Conversation	The following conversation took place recently with my good friend Robert Hormats. We are publishing it here because he provided an eloquent description of the problem, in a way which others will find both pragmatic and frightening. Bob's comments from that evening deserve a global audience, and I hope we will begin to provide that with this issue. http://www.infotech.com/research/how-intellectual-property-drives-the-global-economy-a-centerpiece-conversation
	Asia Letter, Q1 2012: Now It Gets Interesting	In this issue, Eric shares data with us on new strategic issues and movements that are moving minds and money in Japan, ASEAN, and China: post-crisis reawakening of the nuclear export market, U.S. pressure on the new TPP agreement, Japan's tightrope act in trade and currencies, and Japan's new currency deal with China, to name just a few. http://www.infotech.com/research/it-asia-letter-q1-2012-now-it-gets-interesting
	The Landscape in 2012: Skiing Through the Boulders	Today's discussion is a list of major pitfalls awaiting technology and/or the global economy which have the ability to cause real harm in these segments if ignored. http://www.infotech.com/research/it-the-landscape-in-2012-skiing-through-the-boulders
	Top 10 Technology Predictions for 2012	It is suddenly that time of year again: time to review past predictions, rank them, and create a new set, in the hope that, by being reasonably accurate, they will assist our members in planning out strategies in products, markets, and investments for the next 12 months. http://www.infotech.com/research/it-top-10-technology-predictions-for-2012
	Special Letter: An EU View of the EMU	I first met Tim Coldwell as I was becoming introduced to the entrepreneurial people in and around London. Tim had almost folk-legend status during this time, as he helped to digitize and revolutionize the global printing business. Since then, he has moved from the UK to France, and, more important, begun editing the Global Print Monitor. http://www.infotech.com/research/it-special-letter-an-eu-view-of-the-emu
	Who's the Product? Five Related Trends	From the very beginning, Facebook users WERE the product. The fact that humans strive for, and enjoy and benefit from, community, is nothing but an accidental by-product to selling users. Originally, those being sold were the hot girls at Harvard, followed by the guys who lusted after them. Today, every Facebook user has a target painted on his or her forehead. http://www.infotech.com/research/it-whos-the-product-five-related-trends

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🗋	Beyond Broadband: Living AORTA	Over the last decade and a half, I've covered many topics, but there are just a few which are so important that I've dedicated time, money, extra newsletter issues, travel, and even the creation of new entities in an effort to go beyond prediction to making things happen. http://www.infotech.com/research/it-beyond-broadband-living-aorta
🗋	Rewriting Economics: It's All in the Flow	I'd like to share a series of thoughts that occurred to me this week as I listened to the European debate over debt and obligations, and watched Merkozy (as they're now called) kick two deserving politicos right out of their Greek and Italian offices. http://www.infotech.com/research/it-rewriting-economics-its-all-in-the-flow
🗋	Intel vs. ARM: The CPU Architecture War That Will Reshape the Industry	Scott Gardner has been living in the world of chip design and manufacture for decades, and he is perhaps the most technically adept of anyone I know writing about chips today. When we recognized the importance of the Microsoft-ARM alliance, we knew that Scott would understand the little details that everyone else might miss in assessing this brave new tectonically shifting technology world. http://www.infotech.com/research/it-intel-vs-arm-the-cpu-architecture-war-that-will-reshape-the-industry
🗋	Can the Markets be Saved?	This week we're going to look at U.S. equity markets, but this discussion will apply equally well to other nations' equity markets and, to a lesser degree, to other markets, particularly in commodities. http://www.infotech.com/research/it-can-the-markets-be-saved
🗋	The Internet Assistant Arrives	The launch of the new iPhone has various meanings to different groups and people, but there seems to be a strong consensus, from Mossberg to Tim Cook himself, that the recast Siri application is probably the most exciting new offering among all of the 4S' various features. http://www.infotech.com/research/it-the-internet-assistant-arrives
🗋	Measuring Technology Uptake	We appear to be leaving the time when profit dollars per company was the best way to measure the uptake of technology by users. In fact, the uptake of technology may itself be a new way of viewing progress by global IT vendors. http://www.infotech.com/research/it-measuring-technology-uptake
🗋	Special Letter: Diminishing Arctic Sea Ice	It's far past time for us to get beyond the oil and coal lobbies and their propaganda, and move into useful conversation with the rest of the world on how we will proceed in addressing the question of planetary warming, something best visually understood by the rapid elimination of ice in the Arctic. http://www.infotech.com/research/it-special-letter-diminishing-arctic-sea-ice
🗋	Five Things About Q4	Every year, around this time, I publish an estimate of what Q4, the "Christmas Quarter," will look like, particularly from the perspective of technology markets. For almost all vendors, it represents the busiest quarter of the year, often by large percentages, and so it plays a unique role in technology firm planning, and even in questions as esoteric as that of platform war winners. http://www.infotech.com/research/it-five-things-about-q4
🗋	Quantified Health: Towards Digitally Enabled Genomic Medicine	There is a new approach to health available to anyone, today. Described in this issue, it represents a revolution in the balance of power between patient and today's healthcare systems, putting the former in charge, through a program of regularly gathering personal data. http://www.infotech.com/research/it-quantified-health-towards-digitally-enabled-genomic-medicine

Type	Document	Description
	Quantified Health: Towards Digitally Enabled Genomic Medicine (Continued)	There is a new approach to health available to anyone, today. Described in this issue, it represents a revolution in the balance of power between patient and today's healthcare systems, putting the former in charge, through a program of regularly gathering personal data. http://www.infotech.com/research/it-quantified-health-towards-digitally-enabled-genomic-medicine-continued
	You Want It All?	The general feeling in the Valley right now seems to be that there is a dearth of really new ideas or companies in the hopper. DEMO was flat, everyone has their Cleantech investments in place, and people are tired of talking about Facebook for corporations and Farmville look-alikes. http://www.infotech.com/research/it-you-want-it-all
	Special Letter: Don't We Want the Best and Brightest to Come and Stay?	In this piece, the authors attack a key question that faces the United States today: should we let anti-immigration feelings, fired up by the 9.11 attacks and fueled by the invasion of southern border "visitors," affect our global international policies? http://www.infotech.com/research/it-special-letter-dont-we-want-the-best-and-brightest-to-come-and-stay
	Getting Past 9.11	I don't like loose ends, particularly when the attitudes and military efforts of millions of people, for decades to come, will key off the truth about critical events. So, for better or worse, here are the problems I have today with the current U.S. version of what happened on 9.11. http://www.infotech.com/research/it-getting-past-911
	Special Letter: Can India Look After Itself?	Sixty-four years after India's independence in 1947, middle-class Indians are gripped by fears about the future. No, it is not the pathetic performance of the Indian cricket team in England this summer that is the cause - though that rankles. Instead, blindsided by one disclosure after another of massive corruption over the past two years, and facing an economic environment characterized by high inflation (about 10 percent) throughout the past year), Indians' confidence about the future has fallen rapidly. http://www.infotech.com/research/it-special-letter-can-india-look-after-itself
	Seeking Margins	Let's say you're driven by quarterly financial reports to your shareholders; that is, you are a normal European or Western company acting under GAAP accounting rules. This means your income sheet had better show increased operating margins, driven by higher revenues and/or decreased operating costs, or their equivalent. Where do you turn? http://www.infotech.com/research/it-seeking-margins
	Asia Letter: ChinaPan Evolves	Once again, our Asia Editor has brought us an on-the-ground look at the world from a Tokyo-based, post-tsunami perspective. I expect all of our members will find the results of this view to be useful and, to some degree, surprising. http://www.infotech.com/research/it-asia-letter-chinapan-evolves
	Special Alert: Interpreting Google's MOT Move	A great number of electrons have been accelerated in describing Google's move to purchase Motorola Mobility Holdings for about $12.5B. During a dinner I shared with MS Chief Research and Strategy Officer (and member) Craig Mundie that evening, he said he was surprised I hadn't published something on the subject yet; but I don't like telling members things they already know, or can get from the NYT or the WSJ. http://www.infotech.com/research/it-special-alert-interpreting-googles-mot-move

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	Device Confusion	Steve Jobs calls this the "Post-PC Era," so maybe it's all his fault. On the other hand, Gartner ought to take its share of the blame, since it was the first to start putting out misleading titles about PC vs. pad and netbook sales suggesting the former was a dying breed, not seeing that pads and netbooks were fulfilling certain PC tasks. http://www.infotech.com/research/it-device-confusion
	Special Letter: Three Drivers of the Digital Classroom	Technology and Education: two ideas that cannot be separated, and that have yet to be properly merged. In the firmament of veterans in this sector who have the combination of history and technical chops to properly assess our current situation, there are few as capable as our member, Frank Catalano. http://www.infotech.com/research/it-special-letter-three-drivers-of-the-digital-classroom
	Resonance Theory	The basic aspects of this theory have the potential to affect computing, communications, photonics, materials science, and many other sectors we follow daily. For that reason, although it may seem abstract to some, it should be considered critically important for those members following the idea flow from science to technology. http://www.infotech.com/research/it-resonance-theory
	Having It All	In the early days of the personal computer software industry, there were all kinds of products that, it turned out later, were destined to be features. My favorite from that era was a standalone utility called Sideways that let one print - yep - sideways. Today, that would be the "landscape" button on the submenu for print options. http://www.infotech.com/research/it-having-it-all
	Extending Moore's Law: Electronics to Photonics	Earlier this year, I had the pleasure of watching member Michael Hochberg preside at the opening ceremonies of the Institute for Photonic Integration, a new facility at the University of Washington co-funded by Intel, DARPA, the Air Force Office of Sponsored Research, and a few other foresighted groups. At that time, he also described the Institute's new OpSIS program, which is intended to allow developers from all financial backgrounds to begin working in chips that operate on both electronic and photonic circuits. http://www.infotech.com/research/it-extending-moores-law-electronics-to-photonics
	Special Letter: Solving the Greatest Enterprise Security Threat	About five years ago, Ray Ozzie, then newly anointed chief software architect at Microsoft, described the world he saw, from a security perspective, and the vision was daunting. He maintained then, and it surely is true today, that the primary challenge for the enterprise operating system would be to allow trusted computing for a new 'universe of devices.' http://www.infotech.com/research/it-special-letter-solving-the-greatest-enterprise-security-threat
	Seeing the World	During my opening remarks at the 2011 conference, I laid out several memes which seemed to resonate with participants during the rest of the week. I have recast these here, because I think they deserve a larger audience. http://www.infotech.com/research/it-seeing-the-world
	Future in Review Conference 2011: Part 3	In times of recession, the spending efficiency (economic waste) doesn't matter; rather, the allocation of resources (particularly employment) is what matters. There is no mileage in tracking what was spent, or what it created, vs. the importance of getting everyone to work. Keynes first worked this out long ago. http://www.infotech.com/research/it-future-in-review-conference-2011-part-3

Type	Document	Description
	Future in Review Conference 2011: Part 3 (Continued)	In times of recession, the spending efficiency (economic waste) doesn't matter; rather, the allocation of resources (particularly employment) is what matters. There is no mileage in tracking what was spent, or what it created, vs. the importance of getting everyone to work. Keynes first worked this out long ago. http://www.infotech.com/research/it-future-in-review-conference-2011-part-3-continued
	Future in Review Conference 2011: Part 3 (Conclusion)	In times of recession, the spending efficiency (economic waste) doesn't matter; rather, the allocation of resources (particularly employment) is what matters. There is no mileage in tracking what was spent, or what it created, vs. the importance of getting everyone to work. Keynes first worked this out long ago. http://www.infotech.com/research/it-future-in-review-conference-2011-part-3-conclusion
	Future in Review Conference 2011	Normally, adults learn in frames, creating shortcuts for our brains that affect not only what we see, but also our brain structure itself. In order to see the world as it really is, he explained, we must drop all of our frames, regardless of mood, age, religion or political affiliation, and begin to look for patterns instead. Patterns are sitting in the world waiting to be recognized. http://www.infotech.com/research/it-future-in-review-conference-2011
	Special Alert: IP Protection Warning	We have now been warning members of the dangers of a cyber attack on their corporate Intellectual Property for several years. We think the current level of threat has stepped up so quickly as to warrant a warning through this Special Alert. Here are the reasons for this warning. http://www.infotech.com/research/it-special-alert-ip-protection-warning
	The Real Value of Intellectual Property	We live in the Information Age, we're told. But I would like to recast how you see global economics, so with your permission, I am going to ask that you add this verbiage to the pile of traditional global economic thoughts about financial fund flows, balance sheets, and price/earnings ratios. Really, so Yesterday. http://www.infotech.com/research/it-the-real-value-of-intellectual-property
	Special Letter: Bringing "Home Energy Efficiency" into the Home	This week's letter takes many of the clean-energy issues so dear to investors and technologists today square-on, and brings the matter down to spending the same brain cells getting things done: getting them installed and used. http://www.infotech.com/research/it-special-letter-bringing-home-energy-efficiency-into-the-home
	Tracking Trends: The New Four Horsemen	The purpose of this group was to find a few technology stocks that provided long-term growth and a minimum of risk: what are sometimes called "shoebox" stocks, in the sense that one should just buy them, put them away, and forget them for 5-10 years. http://www.infotech.com/research/it-tracking-trends-the-new-four-horsemen
	Federal Angels: Incubating Energy Transformation	Having taken an annual surplus, in the midst of this country's greatest economic expansion, and spent it into a mountain of unnecessary war and economic destruction, the Republican Party has reversed course 180 degrees in just two years, and found a new voice seeking thrift. That's good. http://www.infotech.com/research/it-special-letter-federal-angels-incubating-energy-transformation
	Ten Things CEOs Should Know	CEOs get the weight of the whole company on their shoulders. Although everyone speaks of team effort, it is the CEO's face that is the company's face, and, more important, it is the CEO's brain that leads company strategy. http://www.infotech.com/research/it-ten-things-ceos-should-know

Type	Document	Description
🗋	The Next Space	The most shocking technical failure in United States economic history came directly from its greatest achievement: successfully landing a manned rocket on the moon. No one alive in 1969 would have believed that we would, after a few more visits, not go back again. http://www.infotech.com/research/it-the-next-space
🗋	The Divisive Effect of e-Services	Two divergent tendencies are becoming almost painfully obvious among companies and countries. The fact that both are driven by the same motive force, that of the growth of e-Services, makes their differences all the more striking. http://www.infotech.com/research/it-the-divisive-effect-of-e-services
🗋	Asia Letter, Q1 2011: The Big One	The Japanese government has been urging people to remain calm, trying to prevent panic. The press--particularly the foreign press--has been spinning the story to maximize the headline value, ranging from legitimate emphasis of the most worrying scenarios to irresponsible exaggeration and disregard of the facts. http://www.infotech.com/research/asia-letter-q1-2011-the-big-one
🗋	Crisis as a Lens: The Real Japan	The current triple crisis has put Japan under stresses far beyond what any planner had imagined. In doing so, it has provided an opportunity to see the real Japanese global economic model laid bare. http://www.infotech.com/research/it-crisis-as-a-lens-the-real-japan
🗋	The Role of Science	We have science, based on the discovery and repeated proving of what is objectively real, and which benefits society. And then we have everything else, even things called science which are not. http://www.infotech.com/research/it-the-role-of-science
🗋	The Absolute Power of 1:1 Media	We are at a time when we're about to move from a fascination with social networks to the question of how those networks will be used. Without any doubt, one of the answers will be to provide information of some kind to each and every member. http://www.infotech.com/research/it-the-absolute-power-of-11-media
🗋	Three China Strategies: Dell, Apple, and Lenovo	It takes many things to make a success in the hyper-competitive computer hardware market. This is even more true for the sub-categories of personal computers, desktops, CarryAlongs (pads and netbooks), media players, and smartphones. http://www.infotech.com/research/it-three-china-strategies-dell-apple-and-lenovo
🗋	Special Letter: Talent-Enabled Ecosystems	If you are running a tech company, you are almost certainly familiar with this uncomfortable truth: you need more knowledge workers, but they are getting harder to find as their availability shrinks. http://www.infotech.com/research/it-special-letter-talent-enabled-ecosystems
🗋	The Whiplash Effect: Inflation's Nasty Surprise	The headlines are full of worry about inflation. A few politicians in the U.S. (and elsewhere) are accusing the Fed of feeding inflationary fires through "QE II," the extended quantitative easing program. Central bankers around the world seem violently confused, either raising rates fast (China) or continuing near zero. http://www.infotech.com/research/it-the-whiplash-effect-inflations-nasty-surprise

Type	Document	Description
	An Open Letter to Jeff Immelt	I am writing to you today for two reasons. First, because until these announcements, you seemed to understand the China Model and its one-sided intentions. And second, because you seem to be making the most poorly informed and most damaging statements and decisions of any American business leader today. That's a tall claim, at a time when many U.S. CEOs are making self-destructive decisions, for their shareholders, for their country, and for their companies. http://www.infotech.com/research/it-an-open-letter-to-jeff-immelt
	Special Letter: The Reformers Are Leaving Our Schools in the 20th Century	This is an unprecedented time in U.S. education, and awareness that we have a problem has never been higher. Billions of dollars of public and private money are lined up for solutions. But I am convinced that we shall nonetheless end up with an educational system that is incapable of preparing the bulk of our students for the issues and realities they will face in the 21st century. http://www.infotech.com/research/it-special-letter-the-reformers-are-leaving-our-schools-in-the-20th-century
	Special Alert: Steve Jobs Out Again	With Steve Jobs' announcement that he is taking a medical leave from his position as CEO of Apple Inc., Mark Anderson makes some predictions about how Apple will fare in the marketplace. http://www.infotech.com/research/special-alert-steve-jobs-out-again
	Consumer Technologies: Mirroring Differences	I had the questionable fortune of spending a couple of days with about 137,000 geeklike men of indeterminate age last week, and perhaps 1,500 post-teen slim blonde models. Yes, I went to the Consumer Electronics Show, the largest Las Vegas conference of the year. http://www.infotech.com/research/it-consumer-technologies-mirroring-differences
	Economic Cyberwar: The New Security Mandate	In order to fully appreciate our concept of "Economic Cyberwar," one should start with the idea that the form of war preferred by mercantilist states is not militarist, but economic. Any military conflict is the result of poor planning, and reduces the economic success of the mercantilist, since exports are the prime source of revenues. http://www.infotech.com/research/it-economic-cyberwar-the-new-security-mandate
	Special Letter: The Making of the Film "Climate Refugees - The Human Face of Climate Change"	Publisher's : Today, most citizens, and their leaders, around the world are convinced both of climate change and of the human contribution that is increasingly driving this change. The United States is unusual, perhaps, in the lobbying and PR money spent by oil companies in their "Deny, Delay, and Dither" strategy for facing the financial aspects of the problem, and perhaps also in the way that some members of the conservative political spectrum have found solace in denial. In this, they have been unabashedly aided by Rupert Murdoch's Fox News. http://www.infotech.com/research/it-special-letter-the-making-of-the-film-climate-refugees-the-human-face-of-climate-change
	Predictions for 2011	As usual, I started my annual Predictions Dinner conversation with suggestions of how the landscape would appear in the coming year, before offering 10 predictions. And, before that, I offered my current scoring. Members already know how the calls from last year went (starting with the rather shocking Google cloud hack by China just days after the event). http://www.infotech.com/research/it-predictions-for-2011

Type	Document	Description
	Special Letter: Democratizing Computing: Cellphones as the New Computing Platform	You have watched the industry strategic energies move over time from fewer users of more powerful machines, to a global base of users of many types of less-expensive computing and communications devices. It is almost fair to wonder about the cart and the horse: do cellphones improve the economics of emerging poor, or do those moving from poverty to basic, consumer-level incomes buy more technology? The answer to both is a clear "Yes." http://www.infotech.com/research/it-special-letter-democratizing-computing-cellphones-as-the-new-computing-platform
	Enterprise vs. Consumer	Last week I had a chance to do my second interview with Mark Hurd, recently departed CEO of Hewlett-Packard and now president of Oracle. We covered a great deal of technology landscape in 45 minutes, and one of the critical issues we covered included the title of this week's issue. http://www.infotech.com/research/it-enterprise-vs-consumer
	Individuals Matter	There is an illusion afoot in the technology world that technology matters more than those who work with it; that the mousetrap is more important than those who create, market, and sell it. Those greybeards who have been around a while know the absolute falsehood of this belief. http://www.infotech.com/research/it-individuals-matter
	Special Letter: Empowered Consumers: The New Dawn of Healthcare	Publisher's Note: I first met Gopal Chopra by telephone, and soon after, at our annual New York Predictions Dinner. Gopal is a perfect Overachiever, appearing to cram five careers into a single lifetime, including those of practicing physician and entrepreneur. http://www.infotech.com/research/it-special-letter-empowered-consumers-the-new-dawn-of-healthcare
	Special Letter: The Future of Digital Media	Publisher's Note: This week, while I am in New York speaking on the subject of Digital Media Business Models, we are lucky enough to have detailed views on the subject from two of our global members: Mika Salmi and Pierre Bellanger, both amazing entrepreneurs in the digital age. (Their bios follow their respective essays.) All I need say here is that, after reading years of general puff on how confused things are in the digital content world, I believe they have each created views on the future of digital media that are clear and, I think, correct. Those views are reprinted here, with their permission. http://www.infotech.com/research/it-special-letter-the-future-of-digital-media
	What Is China? Part II: Members Respond	Two weeks ago, we published the issue "What Is China?" Since then, we have gotten the largest response wave in our history. At the request of members, we allowed extended distribution of the issue, and later put it up on our blog, "A Bright Fire," where it also created the largest response rate we've seen. http://www.infotech.com/research/it-what-is-china-part-ii-members-respond
	What Is China?	Most people probably assume that the reason for China's enormous economic growth rates is simply size: anything powered by 1.2B people is bound to make a big splash. But India, with the self-proclaimed "oldest democracy in the world," is about to exceed China's population. http://www.infotech.com/research/what-is-china
	Ten Things We Know	As we enter the New Year, perhaps the overwhelming sense among investors and managers is the long list of what is not known. For most of these people, there has never been a time of greater uncertainty, when literally every parameter is a wild card. http://www.infotech.com/research/it-ten-things-we-know

New Research: Spring - Summer 2015

What's New in Applications Research

Applications Projects & Technology

Systems Integration

Type	Document	Description
Blueprint: Select and Implement a Business Intelligence and Analytics Solution		
	Select and Implement a Business Intelligence and Analytics Solution	It is imperative that organizations take the time to select and implement a BI suite that aligns with business goals and fosters end-user adoption. http://www.infotech.com/research/ss/select-and-implement-a-business-intelligence-and-analytics-solution
	Select and Implement a Business Intelligence and Analytics Solution – Phases 1-3	This deliverable contains the full evaluation of the vendors in the BI Vendor Landscape. Use this vendor analysis to gain a greater understanding of the solutions in the BI market and support your selection of a BI suite. http://www.infotech.com/research/select-and-implement-a-business-intelligence-and-analytics-solution-phases-1-3
	BI Implementation Planning Tool	Once a BI or analytics platform is selected, you need to implement the platform in your servers or on the cloud. The BI Implementation Planning Tool provides a checklist for you to validate the implementation tasks. http://www.infotech.com/research/bi-implementation-planning-tool
	BI Implementation Work Breakdown Structure Template	This work breakdown structure (WBS) provides a standard list of project tasks, the sequence of executing those tasks, and interdependence of the tasks. It helps you to plan your own select and implement BI project. http://www.infotech.com/research/bi-implementation-work-breakdown-structure-template
	BI Planning and Scoring Tool	Use this tool to support your business in conducting an objective evaluation of the BI vendors being considered for procurement. Consider each suite's functional capabilities, architecture, and costs. http://www.infotech.com/research/bi-planning-and-scoring-tool
	BI Project Charter	A project charter serves several important functions. It organizes the BI selection and procurement project so that you can make efficient and effective resource allocation decisions. It also communicates important details about the project purpose, scope definition, and the parameters. http://www.infotech.com/research/bi-project-charter
	BI Request for Proposal Template	Requests for proposal provide organizations with the opportunity to give vendors a detailed account of the requirements and the expected capabilities of their desired suite. Create a defined procurement process by outlining the steps and guidelines for your selection. http://www.infotech.com/research/bi-request-for-proposal-template
	BI Score Calculator	Calculate your BI score at key milestones of your project to measure the effectiveness of your BI program. http://www.infotech.com/research/bi-score-calculator
	BI Test Plan Template	Ensure your designed processes are ready to be employed into the business environment by conducting a series of testing. Use this template to support process owners and developers in testing the viability of your automated processes. http://www.infotech.com/research/bi-test-plan-template

	BI Use-Case Fit Assessment Tool	Use this tool to identify the functional use cases that align with your business's future BI suite. http://www.infotech.com/research/bi-use-case-fit-assessment-tool
	BI Vendor Demo Script	Use this template to support your business's evaluation of vendors and their solutions. Provide vendors with scenarios that prompt them to display not only their solution's capabilities, but also how the tool will support your organization's particular process automation needs. http://www.infotech.com/research/bi-vendor-demo-script
	BI Vendor Shortlist & Detailed Feature Analysis Tool	Use this tool to develop your own custom shortlist. Utilize the tool's knock-out criteria and criteria weightings to identify vendors that align with your business's own solution requirements. http://www.infotech.com/research/bi-vendor-shortlist-detailed-feature-analysis-tool
Blueprint: Select and Implement an ESB Solution		
	Select and Implement an ESB Solution	Integration environments and the connections between different applications become more brittle and complicated as environments change and grow. Integration middleware, namely, Enterprise Service Buses (ESBs) provide a means to streamline application integration by serving as a central connection point. http://www.infotech.com/research/ss/select-and-implement-an-esb-solution
	Select and Implement an ESB Solution – Phases 1-3	Enterprise Service Bus technology helps to improve the interoperability of organizations through the supply of reliable and quick integrations. Use this storyboard and the accompanying Vendor Landscape of the market to support your organization's evaluation and procurement of a best-fit ESB solution. http://www.infotech.com/research/select-and-implement-an-esb-solution-phases-1-3
	Enterprise Service Bus Procurement Project Charter Template	A project charter serves several important functions. It organizes the ESB selection and procurement project so that you can make efficient and effective resource allocation decisions. It also communicates important details about the project purpose, scope definition, and the parameters. http://www.infotech.com/research/enterprise-service-bus-procurement-project-charter-template
	Enterprise Service Bus Requirements Workbook	Use this workbook to support you in documenting the findings of your requirements gathering steps and prepare for your ESB procurement. http://www.infotech.com/research/enterprise-service-bus-requirements-workbook
	Enterprise Service Bus Suite Evaluation and RFP Scoring Tool	Use this tool to support your business in conducting an objective evaluation of the ESB vendors being considered for procurement. Consider each suite's functional capabilities, architecture, and costs while profiling and evaluating the suitability of each solution. http://www.infotech.com/research/enterprise-service-bus-suite-evaluation-and-rfp-scoring-tool
	Enterprise Service Bus Use-Case Fit Assessment Tool	Use this tool to identify the functional use cases that align with your business's future ESB tool. http://www.infotech.com/research/enterprise-service-bus-use-case-fit-assessment-tool
	Enterprise Service Bus Vendor Shortlist & Detailed Feature Analysis Tool	Use this tool to develop your own custom shortlist. Utilize the tool's knock-out criteria and criteria weightings to identify vendors that align with your business's own solution requirements. http://www.infotech.com/research/enterprise-service-bus-vendor-shortlist-detailed-feature-analysis-tool

	Enterprise Service Bus Readiness Assessment Tool	This tool will assist you in determining your organization's readiness for an ESB implementation. http://www.infotech.com/research/enterprise-service-bus-readiness-assessment-tool
	Enterprise Service Bus RFP Template	Use this request for proposal (RFP) template to create a formal invitation for ESB vendors to submit a proposal meeting your ESB requirements. http://www.infotech.com/research/enterprise-service-bus-rfp-template
Blueprint: Select and Implement a Managed File Transfer Solution		
	Select and Implement a Managed File Transfer Solution	As security and compliance become increasing concerns for organizations, FTP is no longer a viable option for transferring files and exchanging data. MFT is now recognized as a necessity. It is imperative that organizations take time to select an MFT solution that meets their business needs and is compatible with their architectural environment. http://www.infotech.com/research/select-and-implement-a-managed-file-transfer-solution
	Select and Implement a Managed File Transfer Solution – Phases 1-3	Use the project steps and activity instructions outlined in this blueprint to streamline your selection process and implementation planning. Save time and money, and improve the impact of your MFT procurement by leveraging Info-Tech's research and project steps. http://www.infotech.com/research/select-and-implement-a-managed-file-transfer-solution-phases-1-3
	Managed File Transfer Evaluation and RFP Scoring Tool	Gathering and scoring the various responses to an RFP can be difficult and time consuming. This tool enables enterprises to evaluate and compare the results of an RFP process quickly and easily. http://www.infotech.com/research/managed-file-transfer-evaluation-and-rfp-scoring-tool
	Managed File Transfer Project Charter Template	This project charter organizes the MFT selection and procurement project so that you can make efficient and effective resource allocation decisions. It also communicates important details about the project purpose, scope definition, and the parameters. http://www.infotech.com/research/managed-file-transfer-project-charter-template
	Managed File Transfer Request for Proposal Template	Request for Proposals provide organizations with the opportunity to give vendors a detailed account of the requirements and the expected capabilities of their desired suite. Create a defined procurement process by outlining the steps and guidelines for your selection. http://www.infotech.com/research/managed-file-transfer-request-for-proposal-template
	Managed File Transfer Requirements Gathering Checklist	The requirements gathering checklist should be used to identify the IT requirements and ensure the MFT solution fits into the organization's current architectural framework. http://www.infotech.com/research/managed-file-transfer-requirements-gathering-checklist
	Managed File Transfer Requirements Gathering Interview Guide	The stakeholder interview guide will assist the project team in the requirements gathering process. Once stakeholder interviews are scheduled, the interviewer can refer to the interview guide to ensure they are asking the right questions and gathering the right data. http://www.infotech.com/research/managed-file-transfer-requirements-gathering-interview-guide

	Managed File Transfer Vendor Shortlist & Detailed Feature Analysis Tool	Use this tool to develop your own custom shortlist. Utilize the tool's criteria weightings to identify vendors that align with your business's own solution requirements. http://www.infotech.com/research/managed-file-transfer-vendor-shortlist-detailed-feature-analysis-tool

Enterprise Applications

Type	Document	Description
Blueprint: Establish a Concrete ERP Foundation		
	Establish a Concrete ERP Foundation	Align the goals, objectives, and metrics of your ERP initiative with organizational objectives to maximize the potential for full benefits realization. Provide IT with the tools needed to sell and deliver this critical project to the business. http://www.infotech.com/research/establish-a-concrete-erp-foundation
	Establish a Concrete ERP Foundation – Phases 1-3	Create a strategic foundation that positions the ERP project for success. http://www.infotech.com/research/establish-a-concrete-erp-foundation-phases-1-3
	ERP Foundation Stakeholder Presentation	Conduct a presentation of the ERP foundation final deliverable for stakeholders. http://www.infotech.com/research/erp-foundation-stakeholder-presentation
	ERP Readiness Assessment Checklist	The ERP Readiness Assessment Checklist ensures the necessary steps are completed before presenting the final deliverable. http://www.infotech.com/research/erp-readiness-assessment-checklist
	Establish an ERP Foundation Project Charter	Prior to project launch, prevent confusion by creating a clear plan that outlines the essential information and project steps. http://www.infotech.com/research/establish-an-erp-foundation-project-charter
	Process Owner Assignment Guide	Use the guidelines to aid you in choosing the right process owners. http://www.infotech.com/research/process-owner-assignment-guide
	ERP Communication Planning Template	Info-Tech has designed a communication plan template to help your organization make ERP initiatives visible and create stakeholder awareness. http://www.infotech.com/research/erp-communication-planning-template
Blueprint: Select and Implement a Marketing Management Suite		
	Select and Implement a Marketing Management Suite	This selection and implementation guide and Vendor Landscape will assist IT leaders to identify the technical and functional requirements of the business, evaluate the MMS market, and select the vendor that best fits the organization's requirements. http://www.infotech.com/research/select-and-implement-a-marketing-management-suite
	Select and Implement a Marketing Management Suite – Phases 1-4	Turbocharge your company's marketing capabilities with a marketing management suite. http://www.infotech.com/research/select-and-implement-a-marketing-management-suite-phases-1-4
	Marketing Management Suite Implementation Work Breakdown Structure	Use this tool to support your outlining of the steps required to successfully implement a MMS suite into your IT landscape and business environment. http://www.infotech.com/research/marketing-management-suite-implementation-work-breakdown-structure

	Marketing Management Suite Project Charter Template	A project charter serves several important functions. It organizes the selection and procurement project so that you can make efficient and effective resource allocation decisions. It also communicates important details about the project purpose, scope definition, and the parameters. http://www.infotech.com/research/marketing-management-suite-project-charter-template
	Marketing Management Suite RFP Scoring Tool	Use this tool to support your business in conducting an objective evaluation of the MMS vendors being considered for procurement. Consider each suite's functional capabilities, architecture, and costs while profiling and evaluating the suitability of each solution. http://www.infotech.com/research/marketing-management-suite-rfp-scoring-tool
	Marketing Management Suite RFP Template	Request for Proposals provide organization's with the opportunity to give vendors a detailed account of the requirements and the expected capabilities of their desired suite. Create a defined procurement process by outlining the steps and guidelines for your selection. http://www.infotech.com/research/marketing-management-suite-rfp-template
	Marketing Management Suite Use-Case Fit Assessment Tool	Use this tool to help build an MMS strategy for the organization based on the specific use case that matches your organizational needs. http://www.infotech.com/research/marketing-management-suite-use-case-fit-assessment-tool
	Marketing Management Suite Vendor Demo Script	Use this template to support your business's evaluation of vendors and their solutions. Provide vendors with scenarios that prompt them to display not only their solution's capabilities, but also how the tool will support your organization's particular needs. http://www.infotech.com/research/marketing-management-suite-vendor-demo-script
	Marketing Management Suite Vendor Shortlist Tool	Use this tool to develop your own custom shortlist. Utilize the tool's knock-out criteria and criteria weightings to identify vendors that align with your business's own solution requirements. http://www.infotech.com/research/marketing-management-suite-vendor-shortlist-tool

Information Management

Type	Document	Description
Vendor Landscape: Content and Email Archiving **REFRESH**		
	Vendor Landscape: Content and Email Archiving	Meeting compliance needs, and reducing the impact of content growth on primary storage are concerns for all organizations. Once you have identified the need for a dedicated product compare the top vendors to select the right fit. http://www.infotech.com/research/vendor-landscape-content-and-email-archiving
	Content and Email Archiving Vendor Landscape Storyboard	Meeting compliance needs and reducing the impact of content growth on primary storage are concerns for all organizations. Once you have identified the need for a dedicated product, compare the top vendors to select the right fit. http://www.infotech.com/research/content-and-email-archiving-vendor-landscape-storyboard

	Content and Email Archiving Vendor Shortlist Tool	This tool allows enterprises to profile their content archiving requirements and generate a rank-ordered vendor shortlist from a fixed list of vendors. http://www.infotech.com/research/content-and-email-archiving-vendor-shortlist-tool

Collaboration & Productivity Apps

Type	Document	Description
Blueprint: Plan and Implement Office 365		
	Plan and Implement Office 365	Organizations are faced with the decision to move Microsoft Exchange, Office, and SharePoint deployments to the cloud through the implementation of Office 365. Create a plan to make the implementation as seamless as possible. http://www.infotech.com/research/plan-and-implement-office-365
	Plan and Implement Office 365 – Phases 1-4	Organizations are faced with the decision to move Microsoft Exchange, Office, and SharePoint deployments to the cloud through the implementation of Office 365. Create a plan to make the implementation as seamless as possible. http://www.infotech.com/research/plan-and-implement-office-365-phases-1-4
	Implement Office 365 Workbook	Order is critical to a successful Office 365 implementation. Use the Office 365 Workbook to create a detailed project plan. http://www.infotech.com/research/implement-office-365-workbook
	Information Classification Tool	The Information Classification Tool is meant to be used to record the known retention rules broken out by risk classification. http://www.infotech.com/research/information-classification-tool
	Office 365 Communication Deck	The Office 365 Communication Deck is a low-maintenance template for communicating the benefits of Office 365 to stakeholders. http://www.infotech.com/research/office-365-communication-deck
	Office 365 End-User Awareness Template	The end-user awareness template provides a series of sample and template emails to use throughout each phase of your Office 365 rollout. http://www.infotech.com/research/office-365-end-user-awareness-template

Applications Management & Governance

Application Selection & Development

Type	Document	Description
Blueprint: Develop APIs That Work Properly for the Organization		
	Develop APIs That Work Properly for the Organization	Web API development is a tactical competency that is important to enabling speed of development, quality of applications, reusability, innovation, and business alignment. Design your web API as a product that promotes speed of development and service reuse. http://www.infotech.com/research/develop-apis-that-work-properly-for-the-organization
	Develop APIs That Work Properly for the Organization – Phases 1-4	Web APIs are important instruments which enable your development teams to increase the quality and code reusability of your applications. Capture the benefits by incorporating key web API development practices. http://www.infotech.com/research/develop-apis-that-work-properly-for-the-organization-phases-1-4-488b35ca-6c9a-46d1-a61d-0b9ae0e28a01

	Web API Design Document Template	This template is meant to be used in conjunction with the Develop APIs that Work Properly for the Organization blueprint to describe the process of determining the design of your web APIs. http://www.infotech.com/research/web-api-design-document-template
	Web API Process Governance Template	This template is meant to be used with the blueprint Develop APIs That Work Properly For Your Organization to describe the process of managing your web APIs. http://www.infotech.com/research/web-api-process-governance-template
	Web API Test Plan Template	This test plan template is meant to be used in conjunction with the Develop APIs that Work Properly for the Organization blueprint to describe the scope and process of web API testing. http://www.infotech.com/research/web-api-test-plan-template
	Web APIs High-Level Design Requirements Template	This design requirements template is meant to describe the necessary business, functional, and non-functional requirements of your web APIs. http://www.infotech.com/research/web-apis-high-level-design-requirements-template
Blueprint: Develop Enterprise Mobile Applications With Realistic and Relevant Performance		
	Develop Enterprise Mobile Applications With Realistic and Relevant Performance	Mobile users within the enterprise are looking for mobile apps that are high performing and easy to use. Understand some of the optimization techniques that are available for developing high performing mobile applications using Info-Tech's framework. http://www.infotech.com/research/develop-enterprise-mobile-applications-with-realistic-and-relevant-performance
	Develop Enterprise Mobile Applications With Realistic and Relevant Performance – Phases 1-3	Mobile users within the enterprise are looking for mobile apps that are high performing and easy to use. Understand some of the optimization techniques that are available for developing high performing mobile applications using Info-Tech's framework. http://www.infotech.com/research/develop-enterprise-mobile-applications-with-realistic-and-relevant-performance-phases-1-3
	Mobile Performance Test Plan Template	Use the Mobile Performance Test Plan Template to describe the scope and process of testing for mobile performance. http://www.infotech.com/research/mobile-performance-test-plan-template
	Mobile Development Visual SOP Template	Use the Mobile Development Visual SOP Template to determine the current mobile development process for your organization. http://www.infotech.com/research/mobile-development-visual-sop-template
	Systems Architecture Template	Use the Systems Architecture Template to document the high-level systems architecture surrounding the application. http://www.infotech.com/research/systems-architecture-template
	Web APIs High-Level Design Requirements Template	This design requirements template is meant to describe the necessary business, functional, and non-functional requirements of your web APIs. http://www.infotech.com/research/web-apis-high-level-design-requirements-template
Blueprint: Strengthen the SSDLC for Enterprise Mobile Applications		
	Strengthen the SSDLC for Enterprise Mobile Applications	Mobile exposes your enterprise systems to new vectors that attackers can exploit, whether that be on the device, over the air, or through back-end systems. Understand some of the secure development techniques that are available for building secure mobile applications using Info-Tech's framework. http://www.infotech.com/research/strengthen-the-ssdlc-for-enterprise-mobile-applications

	Strengthen the SSDLC for Enterprise Mobile Applications – Phases 1-3	Mobile exposes your enterprise systems to new vectors that attackers can exploit, whether that be on the device, over the air, or through back-end systems. Enable your developers with the appropriate resources and technology to build mobile apps securely. http://www.infotech.com/research/strengthen-the-ssdlc-for-enterprise-mobile-applications-phases-1-3
	Mobile Application High-Level Design Requirements Template	Use the High-Level Design Requirements Template to define mobile application design entities that will support business requirements. http://www.infotech.com/research/mobile-application-high-level-design-requirements-template
	Mobile Optimization Roadmap	Use the Mobile Optimization Roadmap to describe the scope and process for optimizing the mobile application. http://www.infotech.com/research/mobile-optimization-roadmap
Blueprint: Modernize Your Corporate Website to Drive Business Value		
	Modernize Your Corporate Website to Drive Business Value	Today, website users are demanding more features, more interactions, and more cross-platform capabilities than what were available in the past. Development teams must be focused on accommodating these user demands with UX-driven designs. http://www.infotech.com/research/modernize-your-corporate-website-to-drive-business-value
	Modernize Your Corporate Website to Drive Business Value – Phases 1-2	Obtain a deep understanding of the business goals and user experience (UX) of your website through personas, use cases, user workflows, and SWOT analysis. Use this knowledge to develop a highly usable design. http://www.infotech.com/research/modernize-your-corporate-website-to-drive-business-value-phases-1-2
	Website Design Document Template	Use the Website Design Document Template to ensure your team understands your user-experience optimization initiatives. http://www.infotech.com/research/website-design-document-template

Project Management Office

Type	Document	Description
Blueprint: Develop a Project Portfolio Management Strategy **REFRESH**		
	Develop a Project Portfolio Management Strategy	As Portfolio Manager, you're responsible for communicating portfolio results and future resource capacity to your steering committee. In order to develop a new or improve PPM strategy, you need to better understand the needs of the PMO and assess the costs and benefits associated with different tools and approaches to PPM. http://www.infotech.com/research/develop-a-project-portfolio-management-strategy
	Develop a Project Portfolio Management Strategy Storyboard	Take the shots you know you can make by aligning your PPM strategy to your organization's needs. http://www.infotech.com/research/develop-a-project-portfolio-management-strategy-storyboard
	PPM Charter Template	Use this template to develop your PPM charter for your long-term plan. http://www.infotech.com/research/ppm-charter-template
	PPM Strategy Template	Use this template to develop your PPM strategy. http://www.infotech.com/research/ppm-strategy-template
	PPM Strategy Development Tool	Use this tool to develop your PPM strategy. http://www.infotech.com/research/it-ppm-strategy-development-tool

Type	Document	Description
	PPM Standard Operating Procedure	Use this template to document decisions, policies, and procedures around your PPM solution. http://www.infotech.com/research/ppm-standard-operating-procedure
Blueprint: Grow Your Own PPM Solution **REFRESH**		
	Grow Your Own PPM Solution	This blueprint will help you develop an affordable, adoptable, and effective PPM solution using widely available tools, based on Info-Tech's ready-to-deploy templates. http://www.infotech.com/research/grow-your-own-ppm-solution
	Grow Your Own PPM Solution – Phases 1-2	This blueprint will help you develop an affordable, adoptable, and effective PPM solution using widely available tools, based on Info-Tech's ready-to-deploy templates. http://www.infotech.com/research/grow-your-own-ppm-solution-phases-1-2
	Project Portfolio Workbook	Use this workbook as a model or first iteration for your homegrown PPM solution. Follow the steps in Info-Tech's Grow Your Own PPM Solution blueprint to populate, customize, and extend this tool to suit your needs. http://www.infotech.com/research/project-portfolio-workbook
	PPM Communications Template	Use the PPM Communications Template to document the results of any decisions you make regarding the PPM solution. http://www.infotech.com/research/ppm-communications-template
	PPM Requirements Definition Template	Use this template to help organize the requirements definition process. http://www.infotech.com/research/ppm-requirements-definition-template
	Resource Allocation Implementation Guide	This implementation guide offers detailed step-by-step instructions for setting up the resource management aspect of the PPM solution. http://www.infotech.com/research/resource-allocation-implementation-guide
	Setup Implementation Guide	This implementation guide offers detailed step-by-step instructions for setting up the Project Portfolio Workbook. This includes the project and resource lists as well as the setup tab. http://www.infotech.com/research/setup-implementation-guide
Blueprint: Optimize Project Intake, Approval, and Prioritization		
	Optimize Project Intake, Approval, and Prioritization	While many IT managers lack the capacity to realistically say "yes" to more project work, many also lack the authority to decline or defer new requests. It's a catch 22 that results in organizations being good at approving projects but bad at starting them and even worse at finishing them. http://www.infotech.com/research/optimize-project-intake-approval-and-prioritization
	Storyboard: Optimize Project Intake, Approval, and Prioritization	Intake, approval, and prioritization represent your best opportunity to ensure the success of your portfolio. http://www.infotech.com/research/storyboard-optimize-project-intake-approval-and-prioritization
	Comprehensive Business Case Template	Use the Comprehensive Business Case Template for requests that require more rigorous business case development. http://www.infotech.com/research/comprehensive-business-case-template
	Detailed Project Request Form	Use the Detailed Project Request Form if your intake processes require more friction. http://www.infotech.com/research/detailed-project-request-form
	Fast Track Business Case Template	Use this fast track template if you want to quicken the development of business cases or for those requests that demand less business case rigor. http://www.infotech.com/research/fast-track-business-case-template

Type	Document	Description
	Light Project Request Form	Use the Light Project Request Form if your intake processes require less friction. http://www.infotech.com/research/light-project-request-form
	Project Intake and Prioritization Tool	Use the Project Intake and Prioritization Tool as a template to help you track and prioritize project requests. http://www.infotech.com/research/project-intake-and-prioritization-tool
	Project Intake Classification Matrix	Use the Project Intake Classification Matrix as you triage requests to help you determine the amount of project management rigor that will be required for new projects. http://www.infotech.com/research/project-intake-classification-matrix
	Project Intake, Approval, and Prioritization Communications Template	Use this template to compile and communicate the standard operating procedures that you have developed over the course of this blueprint. http://www.infotech.com/research/project-intake-approval-and-prioritization-communications-template
	Project Intake, Approval, and Prioritization SOP	Use this template to document your optimized processes for intake, approval, and prioritization. http://www.infotech.com/research/project-intake-approval-and-prioritization-sop
Blueprint: Define and Deploy an Enterprise PMO		
	Define and Deploy an Enterprise PMO	Coordinating information and activities across different types of projects, programs, and portfolios is fraught with difficulties, as each department and business unit has entrenched practices that can often inhibit cross-departmental collaboration. Position your EPMO as your organization's portfolio network—the enterprise hub that facilitates the flow of reliable information to decision makers and project teams. http://www.infotech.com/research/ss/define-and-deploy-an-enterprise-pmo
	Define and Deploy an Enterprise PMO – Phases 1-3	Transform your disconnected silos into an interdependent portfolio network. http://www.infotech.com/research/define-and-deploy-an-enterprise-pmo-phases-1-3
	EPMO Capabilities Survey	Perform our EPMO Capabilities Survey to assess executive needs and to ensure that leadership expectations are clearly set. http://www.infotech.com/research/epmo-capabilities-survey
	EPMO Charter Template	Use this template to develop your charter and help build the business case for your EPMO. http://www.infotech.com/research/epmo-charter-template
	EPMO Communication Planning Template	Use this template to plan your communications with EPMO stakeholders. http://www.infotech.com/research/epmo-communication-planning-template
	EPMO Process Guide and SOP Template	Use this template to develop your EPMO standard operating procedure. http://www.infotech.com/research/epmo-process-guide-and-sop-template
	EPMO Communications Template	Use this template to compile and communicate the standard operating procedures that you have developed over the course of this blueprint. http://www.infotech.com/research/epmo-communications-template
Additional Resources		
	Organizational Change Management Manager	The Organizational Change Management Manager provides organizational change management support to the business to ensure the likelihood of successfully implementing technology-driven change quickly and with reduced risk. http://www.infotech.com/research/organizational-change-management-manager

Architecture

Type	Document	Description
Blueprint: Modernize Data Architecture for Measurable Business Results		
	Modernize Data Architecture for Measurable Business Results	At the heart of tomorrow's insights-driven enterprises is a modern data environment anchored in fit-for-purpose data architectures. The role of traditional data architecture is transcending beyond organizational boundaries and its focus is shifting from "keeping the lights on" to providing game changing insights gleaned from untapped big data. http://www.infotech.com/research/modernize-data-architecture-for-measurable-business-results
	Modernize Data Architecture for Measurable Business Results – Phases 1-3	Develop a data architecture practice that includes both traditional and modern architecture elements in order to support your organization's present-day data requirements and position it to better leverage data-driven insights. http://www.infotech.com/research/modernize-data-architecture-for-measurable-business-results-phases-1-3
	Data Architecture Assessment and Roadmap Tool	Use this diagnostic assessment to analyze the current and future capabilities of the organization's data architecture practice, enterprise data model, and related architectures. http://www.infotech.com/research/data-architecture-assessment-and-roadmap-tool
	Data Architecture Strategic Planning Workbook	Use this workbook template to support your team in documenting the findings from its business assessment and data architecture planning. http://www.infotech.com/research/data-architecture-strategic-planning-workbook
	Modernize Data Architecture Project Charter	Use this charter to ensure your data architecture modernization project is supported by strong project management from the start. http://www.infotech.com/research/modernize-data-architecture-project-charter
	Modernize Data Architecture Roadmap Presentation Template	Use this PowerPoint template to support your team in organizing project findings and presenting the proposed initiatives and roadmap to the project's oversight body. http://www.infotech.com/research/modernize-data-architecture-roadmap-presentation-template

What's New in Infrastructure Research

Infrastructure Projects & Technology

Infrastructure

Type	Document	Description
Blueprint: Select and Implement a Backup Solution		
	Select and Implement a Backup Solution	Backup software and architecture is a mature but evolving market, with a landscape full of vendors with cutting edge solutions and diverse offerings. Identify your business and IT objectives for your desired backup solution through a rigorous and comprehensive requirements gathering process. http://www.infotech.com/research/select-and-implement-a-backup-solution
	Select and Implement a Backup Solution – Phases 1-4	Identify the business and IT objectives for your desired backup solution through a rigorous and comprehensive requirements gathering process. http://www.infotech.com/research/select-and-implement-a-backup-solution-phases-1-4

Type	Document	Description
	Backup Software Vendor Shortlist & Detailed Feature Analysis Tool	Use this tool to develop your own custom shortlist. Utilize the tool's feature analysis and criteria weightings to identify vendors that align with your business's own solution requirements. http://www.infotech.com/research/backup-software-vendor-shortlist-detailed-feature-analysis-tool
	Backup Software Evaluation and RFP Scoring Tool	Use this tool to support your business in conducting an objective evaluation of the backup vendors being considered for procurement. Consider each suite's functional capabilities, architecture, and costs while profiling and evaluating the suitability of each solution. http://www.infotech.com/research/backup-software-evaluation-and-rfp-scoring-tool
	Backup Software Vendor Demo Script	Use this template to support your business's evaluation of vendors and their solutions. Provide vendors with scenarios that prompt them to display not only their solution's capabilities, but also how the tool will support your organization's particular needs. http://www.infotech.com/research/backup-software-vendor-demo-script
	Backup Software RFP Template	Request for proposals provide organizations with the opportunity to give vendors a detailed account of the requirements and the expected capabilities of their desired suite. Create a defined procurement process by outlining the steps and guidelines for your selection. http://www.infotech.com/research/it-backup-software-rfp-template
	Backup Architecture Mapping Template	Use this template to map out your current and ideal backup architectures. http://www.infotech.com/research/backup-architecture-mapping-template
	Backup Architecture Strategy Plan	Use this template to help document and build a backup architecture strategy document for the organization that outlines the current situation and direction of the backup environment over the next three to five years. http://www.infotech.com/research/backup-architecture-strategy-plan
	Backup Solution Implementation Work Breakdown Structure	Use this template to support your outlining of the steps required to successfully implement a backup procurement into your IT landscape and business environment. http://www.infotech.com/research/backup-solution-implementation-work-breakdown-structure
	Backup Strategy Project Charter Template	A project charter serves several important functions. It organizes the backup selection and procurement project so that you can make efficient and effective resource allocation decisions. It also communicates important details about the project purpose, scope definition, and parameters. http://www.infotech.com/research/backup-strategy-project-charter-template
	Backup and Recovery Service Level Agreement Template	Ensure your designed processes are ready to be employed into the business environment by conducting a series of testing. Use this template to support process owners and developers in testing the viability of your automated processes. http://www.infotech.com/research/backup-and-recovery-service-level-agreement-template

Network & Communications

Type	Document	Description
Blueprint: Build or Refresh the Wireless LAN		
	Build or Refresh the Wireless LAN	Your end users are embracing wireless and you can't afford to live in the past. They're demanding faster and more reliable wireless networks as they push the limits of your network's capacity with a growing number of devices per person. Follow Info-Tech's methodology to successfully implement your wireless LAN build or refresh. http://www.infotech.com/research/build-or-refresh-the-wireless-lan
	Storyboard: Build or Refresh the Wireless LAN	This storyboard will guide your organization through the process of conducting either a complete WLAN build, or a refresh of your existing WLAN, from initial requirements gathering, through metrics and network monitoring. http://www.infotech.com/research/storyboard-build-or-refresh-the-wireless-lan
	Wireless LAN Build or Refresh Business Case Template	Obtain the necessary stakeholder buy-in for the WLAN build or refresh using the Wireless LAN Build or Refresh Business Case Template. Provide a full project overview to all parties involved in the process. http://www.infotech.com/research/wireless-lan-build-or-refresh-business-case-template
	Wireless LAN Build or Refresh Implementation Plan Template	Use the WLAN implementation plan in order to break down the network build or refresh into digestible steps. The implementation task monitoring tool further breaks down the activities involved, creating a detailed timeline schedule. http://www.infotech.com/research/wireless-lan-build-or-refresh-implementation-plan-template
	Wireless LAN Requirements Gathering Tool	Use this tool to analyze the current business situation, and translate these business requirements into individual technical requirements for your WLAN build or refresh. http://www.infotech.com/research/wireless-lan-requirements-gathering-tool
	Wireless LAN RFP Scoring Tool	The RFP scoring tool will be the primary tool used in the vendor selection process. Score all WLAN vendors based on their ability to support your technical requirements at a cost-effective price. http://www.infotech.com/research/wireless-lan-rfp-scoring-tool
	Wireless LAN RFP Template	Use the RFP template to initiate the vendor review and selection process. Input data that best applies to your organization and its set of goals and objectives in order to source your WLAN vendor. http://www.infotech.com/research/wireless-lan-rfp-template
	Wireless LAN Task Monitoring Tool	Moving from planning your WLAN build or refresh to actually executing the project is a big step. Ease the transition by breaking the process down into steps, and completing the task monitoring tool as you move along. http://www.infotech.com/research/wireless-lan-task-monitoring-tool
	Wireless LAN User Acceptable Use Policy	User satisfaction is a key driver for the WLAN build or refresh. It is crucial, however, that for the safety and security of your organization, a User Acceptable Use Policy is developed. http://www.infotech.com/research/wireless-lan-user-acceptable-use-policy

Blueprint: Build or Refresh the WLAN for Small Governments		
	Build or Refresh the WLAN for Small Governments	Wi-Fi has become a utility and you can't afford to live in the past. Your employees and residents are not only demanding free Wi-Fi, but also faster and more reliable wireless networks as they push the limits of your network's capacity with a growing number of devices per person. http://www.infotech.com/research/build-or-refresh-the-wlan-for-small-governments
	Build or Refresh the WLAN for Small Governments – Phases 1-4	A fast and reliable wireless connection has ceased to be seen as an "add-on" or extra, and is not an expected service. Make sure that your organization doesn't fall behind, by keeping your wireless network functioning at optimal levels. http://www.infotech.com/research/build-or-refresh-the-wlan-for-small-governments-phases-1-4
	WLAN Build or Refresh Business Case Template for Small Governments	Before moving forward, make a compelling case step to obtain the necessary stakeholder buy-in. Convince all involved parties that this is the right move, using the comprehensive Business Case document. http://www.infotech.com/research/wlan-build-or-refresh-business-case-template-for-small-governments
	WLAN Build or Refresh Implementation Plan Template for Small Governments	Stay focused and on track. Use the implementation plan template to make sure that your team completes the build or refresh project on time. http://www.infotech.com/research/wlan-build-or-refresh-implementation-plan-template-for-small-governments
	WLAN Project Planning and Monitoring Tool for Small Governments	Moving from planning your WLAN build or refresh, to actually executing the project, is a big step. Ease the transition by breaking the process down into steps, and working through the task monitoring tool. http://www.infotech.com/research/wlan-project-planning-and-monitoring-tool-for-small-governments
	WLAN Requirements Gathering Tool for Small Governments	Your organization will have a unique set of requirements that are dependent on your pre-existing infrastructure, corporate use cases, and strategic direction. Identify the primary business and technical requirements before moving forwards. http://www.infotech.com/research/wlan-requirements-gathering-tool-for-small-governments
	WLAN Solution RFP Scoring Tool for Small Governments	Now comes time to finalize the WLAN solution. The Scoring Tool aligns with the RFP Template and the Requirements Gathering Tool, to help you and your team identify which vendor is the best-fit for your project needs. http://www.infotech.com/research/wlan-solution-rfp-scoring-tool-for-small-governments
	WLAN User Acceptable Use Policy for Small Governments	Keep unwanted activity off your network! It is crucial that for the safety and security of your organization, both an Employee and a Public User Acceptable Use Policy are developed. http://www.infotech.com/research/wlan-user-acceptable-use-policy-for-small-governments
	WLAN Vendor Solution Request for Proposal for Small Governments	Selecting your solution for the WLAN build or refresh is one of the most important project decisions. Your RFP plays a key role in helping you select the best fit for the build or refresh project. http://www.infotech.com/research/wlan-vendor-solution-request-for-proposal-for-small-governments

Blueprint: Implement Desktop Virtualization and Transition to Everything as a Service		
	Implement Desktop Virtualization and Transition to Everything as a Service	This project outlines how to successfully implement desktop virtualization, migrating some or all of your workforce from fat clients to remote access desktops, to give them access anytime, anywhere. http://www.infotech.com/research/implement-desktop-virtualization-and-transition-to-everything-as-a-service
	Implement Desktop Virtualization and Transition to Everything as a Service Storyboard	Desktop virtualization continues to evolve, offering solutions for more use cases than ever. The key to success is a carefully crafted implementation plan for your situation, providing the best end-user experience at the lowest TCO. http://www.infotech.com/research/implement-desktop-virtualization-and-transition-to-everything-as-a-service-storyboard
	Desktop Virtualization Application Inventory & Analysis Tool	Assessing the applications in your environment and determining their criticality for end users is an important task in virtualizing the desktop. Use this tool to document and analyze the applications in your environment. http://www.infotech.com/research/desktop-virtualization-application-inventory-analysis-tool
	Desktop Virtualization Communication Plan	End-user acceptance is one of the biggest challenges to desktop virtualization adoption. With a plan to maintain a consistent message and a consistent front, IT can set expectations for end users and combat resistance. http://www.infotech.com/research/desktop-virtualization-communication-plan
	Desktop Virtualization Current State & Appropriateness Tool	Making the decision to deploy desktop virtualization requires consideration of numerous variables. The Desktop Virtualization Current State and Appropriateness Tool will help you ensure every relevant factor is taken into consideration to choose the right deployment method. http://www.infotech.com/research/desktop-virtualization-current-state-appropriateness-tool
	Desktop Virtualization End-User Satisfaction Survey	The Desktop Virtualization End-User Satisfaction Survey is a great way to measure the effectiveness of your desktop virtualization implementation. End users can provide valuable feedback on the performance of their workstations and IT support. http://www.infotech.com/research/desktop-virtualization-end-user-satisfaction-survey
	Desktop Virtualization Evaluation & RFP Response Tool	Request for Proposals provide organizations with the opportunity to give vendors a detailed account of the requirements and the expected capabilities of their desired suite. Create a defined procurement process by outlining the steps and guidelines for your selection. http://www.infotech.com/research/desktop-virtualization-evaluation-rfp-response-tool
	Desktop Virtualization Pilot Test Assessment	The pilot test assessment will help guide your evaluation of the state of the pilot project. It provides a place to record technical requirements, KPIs, and existing or potential problems that have been, or will be, experienced by end users. http://www.infotech.com/research/desktop-virtualization-pilot-test-assessment
	Desktop Virtualization Project Plan	A project plan is an integral document to any initiative. This template will help clarify goals, determine guidelines, and establish milestones to keep a desktop virtualization implementation on track. http://www.infotech.com/research/desktop-virtualization-project-plan

	Desktop Virtualization RFP Template	Organizations in the selection process for a desktop virtualization solution should issue an RFP to gather required information, and make an informed final decision. This RFP template will help streamline your selection process. http://www.infotech.com/research/it-desktop-virtualization-solution-rfp-template
	Desktop Virtualization TCO Calculator	The Desktop Virtualization TCO Calculator provides organizations with a framework for estimating the costs associated with deploying a virtual desktop solution relative to refreshing a fleet of desktops. http://www.infotech.com/research/it-desktop-virtualization-tco-calculator
Blueprint: Seize the Potential of the Internet of Things Today		
	Seize the Potential of the Internet of Things Today	The Internet of Things (IoT) promises massive increases in efficiency, automation, and data-driven decision making. Information on the IoT is plentiful, but few organizations are taking action to implement IoT initiatives. http://www.infotech.com/research/seize-the-potential-of-the-internet-of-things-today
	Seize the Potential of the Internet of Things Today – Phases 1-3	The Internet of Things (IoT) promises massive increases in efficiency, automation, and data-driven decision making. Information on the IoT is plentiful, but few organizations are taking action to implement IoT initiatives. http://www.infotech.com/research/seize-the-potential-of-the-internet-of-things-today-phases-1-3
	Internet of Things Business Case Template	Create a compelling business case to gain buy-in for Internet of Things projects. http://www.infotech.com/research/internet-of-things-business-case-template
	Internet of Things Foundational Infrastructure Assessment Tool	Use this tool to assess the ability of foundational infrastructure to maximize the benefits of Internet of Things disruptions. http://www.infotech.com/research/internet-of-things-foundational-infrastructure-assessment-tool
	Internet of Things Project Plan Template	A project plan is essential for getting Internet of Things initiatives successfully implemented. Use this template to get started. http://www.infotech.com/research/internet-of-things-project-plan-template
	Internet of Things ROI Calculator	Use the ROI calculator to estimate the costs and benefits of Internet of Things investments. http://www.infotech.com/research/internet-of-things-roi-calculator
	Internet of Things SWOT Analysis and Tech Monitor Tool	Use this analysis tool to assess the value and readiness of Internet of Things technologies and communicates the results with visual outputs. http://www.infotech.com/research/internet-of-things-swot-analysis-and-tech-monitor-tool

Infrastructure Management & Governance

Operations

Blueprint: Evaluate Cloud, Co-lo, and In-House DR Deployment Models		
	Evaluate Cloud, Co-lo, and In-House DR Deployment Models	Your current DR solution does not meet business requirements – you either lack a DR site or it is insufficient. Management has mandated for a solution that balances both budget and DR requirements. http://www.infotech.com/research/evaluate-cloud-co-lo-and-in-house-dr-deployment-models

	Evaluate Cloud, Co-lo, and In-House DR Deployment Models – Phases 1-3	Identify a DR solution that balances both cost and strategic considerations. http://www.infotech.com/research/evaluate-cloud-co-lo-and-in-house-dr-deployment-models-phases-1-3
	DR Solution Decision Matrix	Leverage the insights from the Force Field Analysis and determine which deployment model is a best-fit for your organization. http://www.infotech.com/research/dr-solution-decision-matrix
	DR Solution Development Workflow	Follow Info-Tech's DR Solution Development Workflow to select a best-fit DR solution. http://www.infotech.com/research/dr-solution-development-workflow
	DR Solution Executive Presentation Template	Garner executive buy-in by clearly documenting the DR solution analysis process and establish a strong business case for any investments. http://www.infotech.com/research/dr-solution-executive-presentation-template
	DR Solution Force Field Analysis Examples	Conduct a strategic analysis of each DR option. Debate the benefits and drawbacks of each option as a group and determine the feasibility of each option. http://www.infotech.com/research/dr-solution-force-field-analysis-examples
	DR Solution Risk Catalog	Determine the risks that your current IT environment is exposed to and translate that into requirements for your DR solution. http://www.infotech.com/research/dr-solution-risk-catalog
	DR Solution TCO Comparison Tool	Determine the long-term value of your DR solution by conducting a Total Cost of Ownership comparison between each DR solution. http://www.infotech.com/research/dr-solution-tco-comparison-tool
Blueprint: Improve IT Operations Management		
	Improve IT Operations Management	Use this blueprint as a program rather than a project; assess the current state of your organization, revise your service level agreements, and work through the relevant functional areas to improve your ability to deliver on IT services. http://www.infotech.com/research/improve-it-operations-management
	Improve IT Operations Management – Phases 1-3	What is IT operations management? This term encompasses a broad spectrum of IT activities, including all those supporting your organization's ability to delivery IT services. Use this blueprint to assess and guide you through the winding path of operations management. http://www.infotech.com/research/improve-it-operations-management-phases-1-3
	Improve IT Operations Management Current State Assessment	Use the Current State Assessment tool to determine your organization's capability level with respect to each of the functional areas of IT operations management. http://www.infotech.com/research/improve-it-operations-management-current-state-assessment
	Improve IT Operations Management Project Plan	Every project needs a well-structured plan, without one, it would be almost impossible to achieve a successful execution. The IT Operations Management project plan keeps your organization on track by breaking the project down into digestible steps. http://www.infotech.com/research/improve-it-operations-management-project-plan

Blueprint: Reduce Costly Downtime Through DR Testing		
	Reduce Costly Downtime Through DR Testing	DR solutions cannot be trusted to function in a real disaster until it has been tested. Using a proper validation strategy through cyclical DR testing is the only way to truly gain confidence in your DR capabilities. http://www.infotech.com/research/reduce-costly-downtime-through-dr-testing
	Reduce Costly Downtime Through DR Testing Storyboard	Improve the accuracy of your DRP and your team's ability to efficiently execute recovery procedures through regular DR testing. http://www.infotech.com/research/reduce-costly-downtime-through-dr-testing-storyboard
	DR Active Test Evaluation Survey	Ensure that key learning points and test results are documented through a test evaluation survey. http://www.infotech.com/research/dr-active-test-evaluation-survey
	DR System Test Plan Template	Leverage Info-Tech's sample system test plan template to document the recovery process for each system. http://www.infotech.com/research/dr-system-test-plan-template
	DR Test Issue Log and Analysis Tool	Track and analyze the issues/errors that occur during active testing. http://www.infotech.com/research/dr-test-issue-log-and-analysis-tool
	DR Test Plan Active Testing Handbook	Identify and document all the resources necessary to support the facilitator during an active DR test. http://www.infotech.com/research/dr-test-plan-active-testing-handbook
	DR Test Plan Development and Execution Workflow	Follow Info-Tech's DR test development workflow to create a comprehensive test plan. http://www.infotech.com/research/dr-test-plan-development-and-execution-workflow
	DR Test Plan Passive Testing Handbook	Identify and document all the resources necessary to support the facilitator during a passive DR test. http://www.infotech.com/research/dr-test-plan-passive-testing-handbook
	DR Test Plan Project Charter Template	Set expectations for scope, resource requirements, and target dates for building the DR test plan. http://www.infotech.com/research/dr-test-plan-project-charter-template
	DR Test Plan Results Summary Presentation	Demonstrate the growth and accomplishments of your DR test plan to upper management. http://www.infotech.com/research/dr-test-plan-results-summary-presentation
	DR Test Plan Summary Template	Prioritize the systems to include in the test plan, and generate a comprehensive test schedule for the test cycle. http://www.infotech.com/research/dr-test-plan-summary-template
	DR Test Plan System Status Worksheet	Document and manage the systems that are to be included in the test plan to ensure that each system is ready for testing. http://www.infotech.com/research/dr-test-plan-system-status-worksheet
	DR Testing Readiness Assessment Tool	Determine the appropriate level of testing and scope of testing based on your testing maturity. http://www.infotech.com/research/dr-testing-readiness-assessment-tool
Blueprint: Implement a Shared Services Model		
	Implement a Shared Services Model	As your IT group develops and evolves, you can experience excess capacity, superior capabilities, and peers that require similar IT services. Your organization looks to leverage these assets in order to reduce costs and improve overall performance by implementing a shared services model. http://www.infotech.com/research/ss/implement-a-shared-services-model

	Implement a Shared Services Model Storyboard	Before you make the move to implement a shared services model, know the comprehensive list of project risks and implications, and ensure that your business is ready to take the plunge. http://www.infotech.com/research/implement-a-shared-services-model-storyboard
	Data Center Inventory Collection Workbook	The move to integrate technology is a challenging aspect of the move to a shared services model. A detailed analysis of both your organization's site facility, and the site of your customer, ensures compatibility, and eliminates redundancies. http://www.infotech.com/research/data-center-inventory-collection-workbook
	Shared Services Assessment Tool	Your ability to serve your customer's needs and requirements, will be the driving force behind the success of your shared services model. Understand each layer of their organizational requirements and assess their future service needs. http://www.infotech.com/research/shared-services-assessment-tool
	Shared Services Implementation Business Case Template	When implementing a shared services model, it is integral to ensure that all stakeholders involved in the process are on board with the project. All objectives, benefits, and project risks should be clearly communicated through the business case. http://www.infotech.com/research/shared-services-implementation-business-case-template
	Shared Services Implementation Customer Communication Plan	The root cause of many failed implementations of a shared services model is a lack of alignment created between upper management and the staff supporting the project itself. Eliminate this hierarchical boundary using an effective customer communication plan. http://www.infotech.com/research/shared-services-implementation-customer-communication-plan
	Shared Services Implementation Project Planning and Monitoring Tool	Keep careful track of the process of transitioning to a shared services model, by creating a project monitoring plan that details each of the steps involved in transitioning to a shared services model. http://www.infotech.com/research/shared-services-implementation-project-planning-and-monitoring-tool
Blueprint: Improve IT-Business Alignment Through an Internal SLA		
	Improve IT-Business Alignment Through an Internal SLA	The business is rarely satisfied with current service levels. However, this dissatisfaction is often based on perception. Without an internal SLA that effectively tracks current service levels, IT is not able to effectively address perception issues. http://www.infotech.com/research/improve-it-business-alignment-through-an-internal-sla
	Improve IT-Business Alignment Through an Internal SLA Storyboard	Understand business requirements, clarify current capabilities, and enable strategies to close service level gaps. http://www.infotech.com/research/improve-it-business-alignment-through-an-internal-sla-storyboard
	Availability and Reliability SLA Metrics Reporting Template	Establish a framework to collect the necessary metrics to properly evaluate current availability and reliability service levels. http://www.infotech.com/research/availability-and-reliability-sla-metrics-reporting-template

	Availability Internal Service Level Agreement Template	Create the internal availability and reliability SLA by amalgamating the insights from the current and target analysis. http://www.infotech.com/research/availability-internal-service-level-agreement-template
	Build an Internal SLA Project Charter Template	Set expectations for scope, resource requirements, and target dates for building the internal SLA. http://www.infotech.com/research/build-an-internal-sla-project-charter-template
	Internal SLA Process Flowcharts	Follow Info-Tech's internal SLA development workflow to create an internal SLA that address your service level challenges. http://www.infotech.com/research/internal-sla-process-flowcharts
	Service Catalog Internal Service Level Agreement Template	Create the internal service catalog SLA by amalgamating the insights from the current and target state analysis. http://www.infotech.com/research/service-catalog-internal-service-level-agreement-template
	Service Catalog SLA Metrics Reporting Template	Establish a framework to collect the necessary metrics to properly evaluate current service catalog service levels. http://www.infotech.com/research/service-catalog-sla-metrics-reporting-template
	Service Desk Internal Service Level Agreement Template	Create the internal service desk SLA by amalgamating the insights from the current and target state analysis. http://www.infotech.com/research/service-desk-internal-service-level-agreement-template
	Service Desk SLA Metrics Reporting Template	Establish a framework to collect the necessary metrics to properly evaluate current service desk service levels. http://www.infotech.com/research/service-desk-sla-metrics-reporting-template
	SLA Project Roadmap Tool	Document the projects that will improve current service levels and better satisfy the needs of the business. http://www.infotech.com/research/sla-project-roadmap-tool
Blueprint: Standardize the Service Desk **REFRESH**		
	Standardize the Service Desk	The Service Desk is the foundation of all future IT service improvements. Use the knowledge of your team and our experienced analysts to help standardize your Service Desk today. http://www.infotech.com/research/standardize-the-service-desk
Vendor Landscape: Enterprise Service Desk Software **REFRESH**		
	Vendor Landscape: Enterprise Service Desk Software	The enterprise service desk tool landscape provides powerful functionality and advanced features suitable for large, complex IT environments. http://www.infotech.com/research/vendor-landscape-enterprise-service-desk-software
	Enterprise Service Desk Software Vendor Landscape Storyboard	Info-Tech evaluated 13 competitors in the enterprise Service Desk market. http://www.infotech.com/research/enterprise-service-desk-software-vendor-landscape-storyboard
	Enterprise Service Desk Vendor Shortlist & Detailed Feature Analysis Tool	This tool allows large enterprises to generate a customized shortlist of enterprise service desk vendors based on required capabilities and future requirements for product features, architecture, and usability. http://www.infotech.com/research/enterprise-service-desk-vendor-shortlist-detailed-feature-analysis-tool

What's New in Security Research

Security Projects & Technology

Security

Type	Document	Description
Blueprint: Select and Implement a SIEM Solution		
	Select and Implement a SIEM Solution	Security analytics and network monitoring are some of the most effective tactics available to fight against the latest threat landscape. Understand your organization's requirements for a Security Information & Event Management (SIEM) system to ensure the right product selection achieves your key goals. http://www.infotech.com/research/select-and-implement-a-siem-solution
	Select and Implement a SIEM Solution – Phases 1-3	Security Information and Event Management (SIEM) technology provides a great deal of visibility into an organization's networks and can identify extremely sophisticated threats. Leverage this blueprint to select and implement the right-sized solution for your organization. http://www.infotech.com/research/select-and-implement-a-siem-solution-phases-1-3
	SIEM Appropriateness Tool	This tool helps the enterprise determine whether a SIEM solution is appropriate for the organization. http://www.infotech.com/research/siem-appropriateness-tool
	SIEM Procurement Project Charter Template	A project charter serves several important functions. It organizes the SIEM selection and procurement project so that you can make efficient and effective resource allocation decisions. It also communicates important details about the project purpose, scope definition, and parameters. http://www.infotech.com/research/siem-procurement-project-charter-template
	SIEM Suite Evaluation and RFP Scoring Tool	Gathering and scoring the various responses to an RFP can be difficult and time consuming. This tool enables enterprises to evaluate and compare the results of an RFP process quickly and easily. http://www.infotech.com/research/siem-suite-evaluation-and-rfp-scoring-tool
	SIEM Use-Case Fit Assessment	Use this tool to identify the functional use cases that align with your business' future SIEM suite. http://www.infotech.com/research/siem-use-case-fit-assessment
	SIEM RFP Template	Use this template to help create a request for proposal (RFP) for a Security Information & Event Management (SIEM) solution according to your enterprise requirements. http://www.infotech.com/research/it-security-information-event-management-siem-rfp-template
	SIEM Vendor Demo Script	This template is designed to provide Security Information & Event Management (SIEM) vendors with a consistent set of instructions to ensure an objective comparison of product features – all while evaluating ease of use, ease of set-up, and configuration. http://www.infotech.com/research/it-security-information-event-management-siem-vendor-demo-script
	SIEM Vendor Shortlist and Detailed Analysis Tool	This tool allows enterprises to generate a customized shortlist of Security Information & Event Management (SIEM) vendors based on required capabilities and future requirements for your final solution. http://www.infotech.com/research/it-security-information-event-management-siem-vendor-shortlist-tool

Type	Document	Description
Blueprint: Select and Implement an Intrusion Detection and Prevention System		
	Select and Implement an Intrusion Detection and Prevention System	Today's threat landscape is more unpredictable than ever. IDPS is an essential layer if you want to comprehensively protect your networks. http://www.infotech.com/research/select-and-implement-an-intrusion-detection-and-prevention-system
	Select and Implement an Intrusion Detection and Prevention System – Phases 1-4	Today's threat landscape is more unpredictable than ever. An intrusion detection and prevention system (IDPS) is an essential layer if you want to comprehensively protect your networks. http://www.infotech.com/research/select-and-implement-an-intrusion-detection-and-prevention-system-phases-1-4
	IDPS Appropriateness Assessment Tool	This tool aims to help the enterprise determine whether or not an IDP system is appropriate for the organization. http://www.infotech.com/research/idps-appropriateness-assessment-tool
	IDPS Evaluation and RFP Scoring Tool	Enterprises considering an Intrusion Detection and Prevention Solution (IDPS) need to comparatively score potential solutions. http://www.infotech.com/research/idps-evaluation-and-rfp-scoring-tool
	IDPS Procurement Project Charter Template	Ensure proper project management and stakeholder support from the start of your project by properly planning and scoping your IDPS project. http://www.infotech.com/research/idps-procurement-project-charter-template
	IDPS Use-Case Fit Assessment Tool	Help the enterprise determine which use-case scenarios align with the organization's specific requirements for IDPS. http://www.infotech.com/research/idps-use-case-fit-assessment-tool
	IDPS Financial Calculator	IDPS can range from being a costly investment to completely manageable depending on your organization. Calculate the TCO and ROI of an implementation with this tool. http://www.infotech.com/research/idps-financial-calculator
	IDPS RFP Template	A Request for Proposal (RFP) is a formal invitation issued by a business or agency requesting interested vendors to submit written proposals meeting a particular set of requirements. http://www.infotech.com/research/idps-rfp-template
	IDPS Vendor Shortlist and Detailed Feature Analysis Tool	This tool allows enterprises to profile their Intrusion Detection and Prevention System requirements and generate a rank-ordered vendor shortlist from a fixed list of vendors. http://www.infotech.com/research/idps-vendor-shortlist-and-detailed-feature-analysis-tool
	IDPS Vendor Demo Script	This template is designed to provide IDPS vendors with a consistent set of instructions, ensuring an objective comparison of product features – all while evaluating ease of use and ease of set-up and configuration. http://www.infotech.com/research/idps-vendor-demo-script
Additional Resources		
	Secure Cloud Usage Policy	This template outlines how an organization's end users can securely use cloud services through acceptable usage guidelines. It is applicable for varying cloud services (SaaS, PaaS, and IaaS, as well as private, hybrid, and fully hosted) and should be customized based on your organization's cloud usage. http://www.infotech.com/research/secure-cloud-usage-policy

Security Management & Governance

Security & Risk Management

Type	Document	Description
Blueprint: Build a Security Awareness and Training Program		
	Build a Security Awareness and Training Program	Increase the knowledge of your end users by creating a comprehensive and engaging Security Awareness and Training program for your organization. http://www.infotech.com/research/build-a-security-awareness-and-training-program
	Build a Security Awareness and Training Program – Phases 1-4	This solution set will allow you to create a formal security awareness and training program to ensure that your staff are not the weakest link in your security chain. http://www.infotech.com/research/build-a-security-awareness-and-training-program-phases-1-4
	Information Security Awareness and Training Appropriateness Tool	Use this tool to allow you to determine your organization's specific appropriateness for having a security awareness and training program. http://www.infotech.com/research/information-security-awareness-and-training-appropriateness-tool
	Information Security Awareness and Training Content Development Tool	This tool will help to identify content that should be covered by your security awareness and training program. http://www.infotech.com/research/information-security-awareness-and-training-content-development-tool
	Information Security Awareness and Training Content Guide	This guide will act as a starting point for your organization to develop specific content for your end users and staff. http://www.infotech.com/research/information-security-awareness-and-training-content-guide
	Information Security Awareness and Training End-User Survey Template	This template provides example survey questions to ask an organization's end users to assess their current level of understanding of security topics and organizational procedures. http://www.infotech.com/research/information-security-awareness-and-training-end-user-survey-template
	Information Security Awareness and Training Policy	Formalize your security awareness and training program into a policy to ensure that your employees are held accountable. http://www.infotech.com/research/information-security-awareness-and-training-policy
	Information Security Awareness and Training Program Roadmap Tool	This tool will help you to plan out a timeline of your Security Awareness and Training Program. Two roadmaps will be implemented that will include one for your overall project and another for the implementation to your various departments. http://www.infotech.com/research/information-security-awareness-and-training-program-roadmap-tool
	Information Security Awareness and Training Program Workbook	While developing your security awareness and training program, formalize the overall program through documentation of the entire process including the goals, objectives, and success metrics. http://www.infotech.com/research/information-security-awareness-and-training-program-workbook

Blueprint: Build a Security Governance and Management Plan **REFRESH**		
	Build a Security Governance and Management Plan	Technology is not enough alone – security governance and management is needed. Governance and management ensures that your processes, people, and policies support organizational security. It provides a unifying direction and vision for the entire program, instead of having ad hoc controls for each new initiative. http://www.infotech.com/research/build-a-security-governance-and-management-plan
	Build a Security Governance and Management Plan – Phases 1-4	This storyboard walks through the full approach of identifying gaps in a governance and management program, while implementing initiatives to build out the program. http://www.infotech.com/research/build-a-security-governance-and-management-plan-phases-1-4
	Information Security Awareness and Training Appropriateness Tool	Use this tool to allow you to determine your organization's specific appropriateness for having a security awareness and training program. http://www.infotech.com/research/information-security-awareness-and-training-appropriateness-tool
	Information Security Awareness and Training Content Development Tool	This tool will help to identify content that should be covered by your security awareness and training program. http://www.infotech.com/research/information-security-awareness-and-training-content-development-tool
	Security Metrics Assessment Tool	Use this assessment to identify which metrics best align with your organization's risk tolerance level and other requirements. http://www.infotech.com/research/security-metrics-assessment-tool
	Information Security Charter	Without a charter to control and set clear objectives for security, the responsibility of security governance initiatives will likely be undefined within the enterprise, preventing the security governance program from operating efficiently. http://www.infotech.com/research/information-security-charter
	Information Security Governance and Management Business Case Template	Use this template to justify the business value of implementing or improving a security governance and management program. http://www.infotech.com/research/information-security-governance-and-management-business-case-template
	Information Security Governance and Management Gap Analysis and Roadmap Tool	The Information Security Governance and Management Gap Analysis and Roadmap Tool will help you systematically understand your current security state. http://www.infotech.com/research/information-security-governance-and-management-gap-analysis-and-roadmap-tool
	Information Security Incident Response Process Template	Use this template to define a specific process for managing information security incidents to minimize their impact on the organization. http://www.infotech.com/research/information-security-incident-response-process-template
	ISO 27001:2013 Annex A Self-Check List	Use this checklist to assess your CMM level based on ISO 27001:2013. http://www.infotech.com/research/iso-27001-2013-annex-a-self-check-list
	MSSP RFP Template	An RFP is a formal invitation issued by a business or agency requesting interested vendors to submit written proposals meeting a particular set of requirements. This template helps you to choose the right MSSP partner if you are planning to outsource any security functions. http://www.infotech.com/research/mssp-rfp-template

	Security Governance and Management Challenge Analysis Tool	Use this tool to help you organize and prioritize your current security governance and management challenges. http://www.infotech.com/research/security-governance-and-management-challenge-analysis-tool
	Security Governance and Management Communication Plan	This template will help you organize your various security communication efforts with different stakeholders. http://www.infotech.com/research/security-governance-and-management-communication-plan
	Security Governance Organizational Structure	A formalized security organizational structure assigns and defines the security roles and responsibilities of different members in the organization. Clarity of responsibilities ensures owners are accountable. http://www.infotech.com/research/security-governance-organizational-structure
	Security Pressure Posture Analysis Tool	Security pressure posture analysis helps your organization assess your real security context and enables your organization to invest in the right security functions while balancing the cost and value in alignment with business strategies. http://www.infotech.com/research/security-pressure-posture-analysis-tool
	Security Service Catalog Template	Use this catalog template to create a formal list of information security services offered and service level agreements. http://www.infotech.com/research/security-service-catalog-template
	Information Security Risk Management Template	Use this template to build your information security risk management process. http://www.infotech.com/research/information-security-risk-management-template
	Information Security Compliance Template	Use this template to manage your information security compliance requirements. http://www.infotech.com/research/information-security-compliance-template
	Employee Termination Process Checklist - IT Security Example	Use flowcharts and checklists to create effective SOP documents. http://www.infotech.com/research/it-employee-termination-process-checklist-it-security-example
Blueprint: Develop and Implement a Security Incident Management Program		
	Develop and Implement a Security Incident Management Program	Effective and efficient incident management involves a formal process of preparation, detection, analysis, containment, eradication, recovery, and post-incident activities. This blueprint will walk through the steps of developing a scalable and systematic incident response program relevant to your organization. http://www.infotech.com/research/develop-and-implement-a-security-incident-management-program
	Develop and Implement a Security Incident Management Program – Phases 1-3	Effective and efficient management of incidents involves a formal process of preparation, detection, analysis, containment, eradication, recovery, and post-incident activities. This storyboard will walk through the steps of developing a scalable and systematic incident response program relevant to your organization. http://www.infotech.com/research/develop-and-implement-a-security-incident-management-program-phases-1-3
	Credential Compromise Use Case Template	Incidents can be categorized into use cases for which a standardized response process can be defined, eliminating inconsistency and ambiguity while increasing operational efficiency. Clearly document use cases that pertain to the incidents commonly faced by your organization. http://www.infotech.com/research/credential-compromise-use-case-template

	DDoS Use Case Template	Incidents can be categorized into use cases for which a standardized response process can be defined, eliminating inconsistency and ambiguity while increasing operational efficiency. Clearly document use cases that pertain to the incidents commonly faced by your organization. http://www.infotech.com/research/ddos-use-case-template
	Incident Management Stakeholder Proposal Template	Management buy-in is key to effective incident response. The approval indicates that security is top-of-mind and that the process aligns with business objectives. Adherence is fundamental for a secure organization, so funds will be made available for this initiative. http://www.infotech.com/research/incident-management-stakeholder-proposal-template
	Information Security Incident Management Guide	Formalize the security incident management program by defining a central, high-level guide to describe goals, roles, and responsibilities, as well as the process that will underlie all incident classification and response. http://www.infotech.com/research/information-security-incident-management-guide
	Security Incident Management Communications Plan	Manage the perceptions of all stakeholders to create awareness of the incident, minimize reputation damage, expedite crisis recovery, and reduce overall impact to the organization. http://www.infotech.com/research/security-incident-management-communications-plan
	Security Incident Metrics Tool	Identify relevant metrics to assist in evaluating the success of your organization's incident response processes. http://www.infotech.com/research/security-incident-metrics-tool
	Security Incident Use Case Development Prioritization Tool	Prioritize the order in which the security incident use case documents will be developed based on the frequency and the impact to the business of past incidents. http://www.infotech.com/research/security-incident-use-case-development-prioritization-tool
	Malware Infection Use Case Template	Incidents can be categorized into use cases for which a standardized response process can be defined, eliminating inconsistency and ambiguity while increasing operational efficiency. Clearly document use cases that pertain to the incidents commonly faced by your organization. http://www.infotech.com/research/malware-infection-use-case-template
Blueprint: Implement and Optimize an Effective Security Management Metrics Program		
	Implement and Optimize an Effective Security Management Metrics Program	Security metrics allow the organization to understand its current risk posture and support initiatives to reduce those risks. http://www.infotech.com/research/implement-and-optimize-an-effective-security-management-metrics-program
	Implement and Optimize an Effective Security Management Metrics Program – Phases 1-3	Use this blueprint to initiate a security metrics program, regardless of your organization's maturity level. Once you've started, this research will also help you grow and mature your metrics program. http://www.infotech.com/research/implement-and-optimize-an-effective-security-management-metrics-program-phases-1-3
	Security Metrics Assessment Tool	Use this assessment to identify which metrics best align with your organization's risk tolerance level and other requirements. http://www.infotech.com/research/security-metrics-assessment-tool

	Security Metrics Executive Communications Presentation	Communication is a significant contributor to the success of your metrics program. Make sure you're sharing the metrics that truly matter to business stakeholders. http://www.infotech.com/research/security-metrics-executive-communications-presentation
	Security Metrics Summary Document	Use this template as the one document where your metrics and their definitions live, and update it as needed. http://www.infotech.com/research/security-metrics-summary-document
Blueprint: Build an Information Security Strategy **REFRESH**		
	Build an Information Security Strategy	Use Info-Tech's robust information security framework with supporting methodologies to generate your organization's comprehensive, highly actionable, and measurable security strategy and roadmap. http://www.infotech.com/research/build-an-information-security-strategy
	Build an Information Security Strategy – Phases 1-4	Info-Tech has developed and tested a robust information security framework with supporting methodologies to generate your organization's comprehensive, actionable, and measurable security strategy and roadmap. http://www.infotech.com/research/build-an-information-security-strategy-phases-1-4
	Business Requirement Security Strategy Mapping Tool	Use this tool to map business and IT initiatives to specific security mitigation controls. This tool is a documentation and mapping support tool as part of your larger security strategy creation process. http://www.infotech.com/research/business-requirement-security-strategy-mapping-tool
	Information Security Strategy Workbook Template	Clearly identifying and documenting your information security obligations, scope, goals and other pertinent information are essential parts of building and implementing a holistic and effective information security program. http://www.infotech.com/research/information-security-strategy-workbook-template
	Security Pressure Posture Analysis Tool	Security pressure posture analysis helps your organization assess your real security context and enables your organization to invest in the right security functions while balancing the cost and value in alignment with business strategies. http://www.infotech.com/research/security-pressure-posture-analysis-tool
	Information Security Program Gap Analysis and Roadmap Tool	To enable an effective security program, all areas of security need to be evaluated closely to determine where the organization sits currently and where it needs to go to in the future. http://www.infotech.com/research/information-security-program-gap-analysis-and-roadmap-tool
	Information Security Charter	Without a charter to control and set clear objectives for security, the responsibility of security governance initiatives will likely be undefined within the enterprise, preventing the security governance program from operating efficiently. http://www.infotech.com/research/information-security-charter
	Security Governance Organizational Structure	A formalized security organizational structure assigns and defines the security roles and responsibilities of different members in the organization. Clarity of responsibilities ensures owners are accountable. http://www.infotech.com/research/security-governance-organizational-structure
	Security Service Catalog Template	Use this catalog template to create a formal list of information security services offered and service level agreements. http://www.infotech.com/research/security-service-catalog-template

	Information Security Communication Plan Template	Communication between security and the rest of the business can be difficult because the two parties often speak different languages. Your security messages should be tailored to each stakeholder to keep them informed and engaged in security initiatives. http://www.infotech.com/research/information-security-communication-plan-template
	Information Security Strategy and Roadmap Communication Deck	Use this template to present the results of your information security strategy planning to your stakeholders. http://www.infotech.com/research/information-security-strategy-and-roadmap-communication-deck
	Security Service Catalog Template	Use this catalog template to create a formal list of information security services offered and service level agreements. http://www.infotech.com/research/security-service-catalog-template

What's New in Strategy & Leadership Research

Strategy & Leadership Management & Governance

Strategy & Governance

Type	Document	Description
Blueprint: Inspire an IT-Led Revolution		
	Inspire an IT-Led Revolution	Satisfaction among executives regarding IT's ability to meet key business objectives has been dropping steadily; IT leaders, both new and existing, need to enact change and they need to do it quickly. http://www.infotech.com/research/inspire-an-it-led-revolution
	Inspire an IT-Led Revolution – Phases 1-4	IT leaders, both new and existing, need to enact change and they need to do it quickly. Plan your change in 100-day spurts to focus your efforts and provide you with clear, measurable goals to work towards. http://www.infotech.com/research/inspire-an-it-led-revolution-phases-1-4
	100-Day Plan Presentation Template	Showcase your successes to management with an impressive presentation. http://www.infotech.com/research/100-day-plan-presentation-template
	100-Day Plan Stakeholder Interview Guide	Conduct interviews to harness input from your key stakeholders. http://www.infotech.com/research/100-day-plan-stakeholder-interview-guide
	100-Day Plan SWOT Analysis Template	Learn the strengths, weaknesses, opportunities, and threats that affect the department or organization. http://www.infotech.com/research/100-day-plan-swot-analysis-template
	100-Day Plan Template	Create a 100-day plan as a new IT leader. http://www.infotech.com/research/100-day-plan-template
	New Leader Self-Assessment	Assess your strengths and areas of opportunity as a new leader. http://www.infotech.com/research/new-leader-self-assessment
Blueprint: Survive an Impending Audit		
	Survive an Impending Audit	A failed audit can result in punitive fines and injunctions that disrupt continuing operations until violations are resolved. These highly visible failures are best prevented through auditor-enterprise collaboration and pragmatic audit management. http://www.infotech.com/research/survive-an-impending-audit

Type	Document	Description
	Storyboard: Survive an Impending Audit	This blueprint walks a CIO through an audit to minimize risk, mitigate findings, and maximize auditor value. http://www.infotech.com/research/storyboard-survive-an-impending-audit
	Audit Scoping Email Template	This template is used to assist with audit scoping. http://www.infotech.com/research/audit-scoping-email-template
	Audit Guide	The audit guide will prepare everyone in the IT organization for their role in the audit and ensure that IT staff and management understand the audit scope, objectives, and proper audit conduct. http://www.infotech.com/research/audit-guide
	Audit Preparation Presentation Template	This template is used to prepare staff and management for the next audit by displaying audit roles and conduct guidelines. http://www.infotech.com/research/audit-preparation-presentation-template
	Audit Launch Email Template	This template is used to assist the audit launch process. http://www.infotech.com/research/audit-launch-email-template
Blueprint: Make IT a Successful Partner in M&A Integration		
	Make IT a Successful Partner in M&A Integration	Many organizations forget the essential role IT plays during M&A integration. The involvement of IT is critical to providing a better view of risks, improving ease of integration, and optimizing synergies. http://www.infotech.com/research/ss/make-it-a-successful-partner-in-m-a-integration
	Make IT a Successful Partner in M&A Integration – Phases 1-4	Organizations continue to underestimate the role of IT during M&A integration. Use the steps in this blueprint to kick-start your IT integration effort. http://www.infotech.com/research/make-it-a-successful-partner-in-m-a-integration-phases-1-4
	IT Integration Charter	Use the IT Integration Charter to document organizational objectives for the merger or acquisition and prepare your team to successfully launch the integration effort. http://www.infotech.com/research/it-integration-charter
	IT Integration Roadmap Tool	Use the IT Integration Roadmap Tool to track key elements during the M&A discovery, integration planning, and execution phases. http://www.infotech.com/research/it-integration-roadmap-tool

Architecture

Blueprint: Bridge IT and the Business With Business Architecture		
	Bridge IT and the Business With Business Architecture	In the face of major organizational change, realignment of IT and the business, or enablement of IT-led business innovation, IT must develop the capability to practice business architecture and gain a holistic understanding of your organization via the creation of architectural blueprints. http://www.infotech.com/research/bridge-it-and-the-business-with-business-architecture
	Bridge IT and the Business With Business Architecture Storyboard	This storyboard will provide you with a step-by-step guide for how to practice business architecture at your organization, including guidance on how to model your business through the creation of architectural blueprints. http://www.infotech.com/research/bridge-it-and-the-business-with-business-architecture-storyboard

Value & Performance

Blueprint: Drive Efficiency and Agility with a Fit-for-Purpose Quality Management Program		
	Drive Efficiency and Agility with a Fit-for-Purpose Quality Management Program	IT is under constant pressure to deliver high quality projects and services while at the same time be increasingly innovative, agile, cost-effective, and operationally excellent. These mandates can confuse CIOs, resulting in misaligned or conflicting initiatives and wasted resources. http://www.infotech.com/research/drive-efficiency-and-agility-with-a-fit-for-purpose-quality-management-program
	Drive Efficiency and Agility with a Fit-for-Purpose Quality Management Program – Phases 1-4	This blueprint walks a CIO through the building and implementing of fit-for-purpose quality management program in an effort to enhance IT quality, increase business satisfaction, and continue to improve service delivery. http://www.infotech.com/research/drive-efficiency-and-agility-with-a-fit-for-purpose-quality-management-program-phases-1-4
	Quality Management Capability Assessment and Planning Tool	Assess your current quality management maturity. http://www.infotech.com/research/quality-management-capability-assessment-and-planning-tool
	Quality Management Capability Improvement Plan	Use this tool to track your quality management improvement initiatives. http://www.infotech.com/research/quality-management-capability-improvement-plan
	Quality Management Communication Plan Template	Use this template to plan your communications throughout your program implementation. http://www.infotech.com/research/quality-management-communication-plan-template
	Quality Management Dashboard Template	Use this dashboard to track your quality management metrics. http://www.infotech.com/research/quality-management-dashboard-template
	Quality Management Practice Area Assessment and Planning Tool	Assess the current quality management maturity of each IT practice area. http://www.infotech.com/research/quality-management-practice-area-assessment-and-planning-tool
	Quality Management Program Charter	Use this template to document your quality management program strategy. http://www.infotech.com/research/quality-management-program-charter
	Quality Management Quality Plan Template	Use this template to form quality plans for each IT practice area. http://www.infotech.com/research/quality-management-quality-plan-template
	Quality Management Readiness Assessment Template	Use this tool to determine if your IT department is ready for the change associated with the quality management program. http://www.infotech.com/research/quality-management-readiness-assessment-template
	Quality Management Review Template	Use this template to form a standard quality review template that can be used to periodically review the performance of the quality initiatives in your key IT practice areas. http://www.infotech.com/research/quality-management-review-template
	Quality Management Roadmap	Use this template to keep track of quality management initiatives. http://www.infotech.com/research/quality-management-roadmap
	Quality Management User Satisfaction Survey	Modify this survey template to understand satisfaction related to IT quality. http://www.infotech.com/research/quality-management-user-satisfaction-survey

Blueprint: Establish a Service Metrics Program That Meets Business Needs		
	Establish a Service Metrics Program That Meets Business Needs	In order to produce insightful service metrics reports that lead to corrective actions, CIOs must identify key metrics based on business goals/metrics and present them in a concise and tailored report for the targeted audience. http://www.infotech.com/research/establish-a-service-metrics-program-that-meets-business-needs
	Establish a Service Metrics Program That Meets Business Needs – Phases 1-5	Use Info-Tech's five-phase process to design or improve your metrics program. This blueprint will help your organization determine metrics that the business cares about and improve the metrics collection and reporting process. http://www.infotech.com/research/establish-a-service-metrics-program-that-meets-business-needs-phases-1-5
	Business Satisfaction With IT Survey	The Business Satisfaction With IT Survey is used to understand the level of satisfaction toward IT within the organization. Use this survey to help establish and track your baseline metrics. http://www.infotech.com/research/business-satisfaction-with-it-survey
	Metrics Tracking Tool	The Metrics Tracking Tool is used to track the collection, reporting, and performance of IT metrics. This tracking tool will also help your organization determine the frequency and owner of the service tracking. http://www.infotech.com/research/metrics-tracking-tool
	Sample Metrics Selection and Reporting Tool	The Sample Metrics Selection and Reporting Tool contains hundreds of sample metrics and provides a template for dashboard reporting. http://www.infotech.com/research/sample-metrics-selection-and-reporting-tool
	Service Definition Chart	The Service Definition Chart is used to list all existing services that are offered in the service catalog. This will help IT to track all important services. http://www.infotech.com/research/service-definition-chart
	Service Metrics Mapping Template	The Service Metrics Mapping Template is used to help organizations list all supporting IT services based on predetermined service metrics. http://www.infotech.com/research/service-metrics-mapping-template
	Service Metrics Program Maturity Assessment	The Service Metrics Program Maturity Assessment is used to determine maturity level. It looks at how well your metrics program is meeting business needs and how optimized your metrics processes are. http://www.infotech.com/research/service-metrics-program-maturity-assessment
	Service Metrics Program Project Roadmap Tool	The Service Metrics Program Project Roadmap Tool is used to organize and monitor project work. Once the project begins, real-time progress is tracked and the project is monitored against the set baselines. http://www.infotech.com/research/service-metrics-program-project-roadmap-tool
	Service Metrics Program Stakeholder & Communication Planning Template	Use the Service Metrics Program Stakeholder & Communication Planning Template to document your list of project stakeholders. The template outlines anticipated communications requirements and the methods to be used for project communication. http://www.infotech.com/research/service-metrics-program-stakeholder-communication-planning-template
	Service Metrics Project Charter	The Service Metrics Project Charter is used to communicate the value and rationale of creating a service metrics program to key stakeholders. http://www.infotech.com/research/service-metrics-project-charter

Blueprint: Five Secrets to Optimize Your People, Technology, and Budget		
	Five Secrets to Optimize Your People, Technology, and Budget	Maximize the value of your people and technology resources through effective planning and optimization. http://www.infotech.com/research/five-secrets-to-optimize-your-people-technology-and-budget
	Five Secrets to Optimize Your People, Technology, and Budget Storyboard	Leverage this blueprint to create an effective resource strategy that optimizes your technology, people, and budget resources in a realistic and cost effective way. http://www.infotech.com/research/five-secrets-to-optimize-your-people-technology-and-budget-storyboard
	Resource Optimization Opportunity Overview Template	This template should be used to document resourcing pain points, objectives, and metrics, including opportunities to leverage your resource strategy. http://www.infotech.com/research/resource-optimization-opportunity-overview-template
	Resource Optimization Primer Email	Prepare IT staff for the time audit and the possible need for a resourcing optimization program overhaul. http://www.infotech.com/research/resource-optimization-primer-email
	Resource Optimization Time Tracking Template	This tool will help you forecast your people resource demand for non-project work. It will also help you analyze how employees are currently spending their time. http://www.infotech.com/research/resource-optimization-time-tracking-template
	Resource Optimization Workbook	This tool will be used to forecast your resource utilization (both people and technology). The tool will cover both project and non-project allocation, and will provide you with critical reports which illustrate how resources are used at your organization. http://www.infotech.com/research/resource-optimization-workbook
	Resource Strategy Issue and Change Log	Leverage the Resource Strategy Issues and Change Log to serve as one location to document changes and challenges throughout the year. http://www.infotech.com/research/resource-strategy-issue-and-change-log
	Resource Strategy Project Plan	Use this tool to document the key steps in building and monitoring a resource strategy, including your project timeline. http://www.infotech.com/research/resource-strategy-project-plan
	Resource Strategy Technology Inventory Interview Guide	Identify current capacity or supply of technology resources by conducting a series of interviews with relevant stakeholders such as Heads of Infrastructure and Applications. http://www.infotech.com/research/resource-strategy-technology-inventory-interview-guide
	Resource Strategy Time Tracking Interview Guide	Customize Info-Tech's Time Tracking Interview Guide to conduct interviews with a representative sample of IT staff to identify how they are spending their time across project and non-project work. http://www.infotech.com/research/resource-strategy-time-tracking-interview-guide
	Time Tracking Survey	Evaluate the current issues with project and non-project time allocation within your workforce. http://www.infotech.com/research/time-tracking-survey

Blueprint: Create Project Management Success		
	Create Project Management Success	Investing time upfront to plan the project and implementing best practices during project execution to ensure project is delivered with the planned outcome and quality is critical to project success. Projects will be less costly and more likely to deliver value to the organization. http://www.infotech.com/research/create-project-management-success
	Create Project Management Success Storyboard – Phases 1-4	Investing time upfront to plan the project is critical to project success. Projects will be less costly and more likely to deliver value to the organization. http://www.infotech.com/research/create-project-management-success-storyboard-phases-1-4
	Benefits Management Plan	The Benefits Management Plan is used to document project benefits and create a plan for realizing those benefits. This workbook should be used to categorize benefits and record relevant information regarding impact, stakeholders affected, and time to realization. http://www.infotech.com/research/benefits-management-plan
	Change Impact Register	The Change Impact Register is used to identify the specific impact a project will have on affected stakeholders and user groups, as well as the reaction you expect to receive from the stakeholder or user group. http://www.infotech.com/research/change-impact-register
	Customer/Sponsor Project Status Meeting Template	The Project Status Meeting Template is used to outline key activities and outcomes of the status meeting. The helps project team members and stakeholders keep track of the project progress. http://www.infotech.com/research/customer-sponsor-project-status-meeting-template
	Deliverable Acceptance Form Template	The Deliverable Acceptance Form Template is used to outline project deliverable sign-off criteria. Use this template to ensure business and technical acceptance criteria are met. http://www.infotech.com/research/deliverable-acceptance-form-template
	Final Sign-Off and Acceptance Form Template	The Final Sign-off and Acceptance Form is used to outline project final sign-off criteria. Use this template to obtain final sign-off by closing all project activities, such as release project team and close-off vendors, etc. http://www.infotech.com/research/final-sign-off-and-acceptance-form-template
	Handover to Operations Template	The Handover to Operations Template is used to document all necessary steps to transfer project knowledge and technical documents. Use this template to document important issues and dependencies. http://www.infotech.com/research/handover-to-operations-template
	Initiative Roadmap Tool	The Initiative Roadmap Tool is used to organize and monitor project work. Project milestones and tasks can accurately be planned out. Once the project begins, real-time progress is tracked and the project is monitored against the set baselines. http://www.infotech.com/research/initiative-roadmap-tool
	Learning and Development Plan	The Learning and Development Plan is used to document the skills that all impacted stakeholders and users will need to acquire, and to plan appropriate training that can be delivered before the project is implemented. http://www.infotech.com/research/learning-and-development-plan
	Level 1 Communications Management Plan Template	The Level 1 Communications Management Plan Template is used to outline the anticipated communications requirements and the methods to be used for project communication. Use this template for level 1 projects. http://www.infotech.com/research/level-1-communications-management-plan-template

	Level 1 Project Change Request Template	The Level 1 Project Change Request Template is used to documents scope change request and its assessment and escalation guidelines. Use this template for Level 1 projects. http://www.infotech.com/research/level-1-project-change-request-template
	Level 1 Project Charter Template	The Level 1 Project Charter Template is used to organize the project. It communicates details about the project purpose, scope, and parameters. Use this template for Level 1 projects. http://www.infotech.com/research/level-1-project-charter-template
	Level 1 Project Status Report Template	The Level 1 Project Status Report Template is used to inform stakeholders of the project progress. It outlines the key accomplishments, upcoming tasks and issues to concisely inform key stakeholders. Use this template for Level 1 projects. http://www.infotech.com/research/level-1-project-status-report-template
	Level 1 Recommendation and Decision Tracking Log	The Level 1 Recommendation and Decision Tracking Log is used to track scope change decisions and its impacts. Use this tool for Level 1 projects. http://www.infotech.com/research/level-1-recommendation-and-decision-tracking-log
	Level 1 Risk Management Workbook	The Level 1 Risk Management Workbook is used to create the project's risk management plan to mitigate or eliminate potential risks. Use this tool for Level 1 projects. http://www.infotech.com/research/level-1-risk-management-workbook
	Level 1 Scope Statement Template	The Level 1 Scope Statement Template is used to outline project deliverables in detail and provide a common understanding of project scope for all stakeholders. Use this template for Level 1 projects. http://www.infotech.com/research/level-1-scope-statement-template
	Level 2 and 3 Communications Management Plan Template	The Level 2 and 3 Communications Management Plan Template is used to outline the anticipated communications requirements and the methods to be used for project communication. Use this template for level 2 and 3 projects. http://www.infotech.com/research/level-2-and-3-communications-management-plan-template
	Level 2 and 3 Project Change Request Template	The Level 2 and 3 Project Change Request Template is used to documents scope change request and its assessment and escalation guidelines. Use this template for Level 2 and 3 projects. http://www.infotech.com/research/level-2-and-3-project-change-request-template
	Level 2 and 3 Recommendation and Decision Tracking Log	The Level 2 and 3 Recommendation and Decision Tracking Log is used to track scope change decisions and its impacts. Use this tool for Level 2 and 3 projects. http://www.infotech.com/research/level-2-and-3-recommendation-and-decision-tracking-log
	Level 2 and 3 Risk Management Workbook	The Level 2 and 3 Risk Management Workbook is used to create the project's risk management plan to mitigate or eliminate potential risks. Use this tool for Level 2 and 3 projects. http://www.infotech.com/research/level-2-and-3-risk-management-workbook
	Level 2 and 3 Scope Statement Template	The Level 2 and 3 Scope Statement Template is used to outline project deliverables in detail and provide a common understanding of project scope for all stakeholders. Use this template for Level 2 and 3 projects. http://www.infotech.com/research/level-2-and-3-scope-statement-template

	Level 2 and Level 3 Project Status Report Template	The Level 2 and 3 Project Status Report Template is used to inform stakeholders of the project progress. It outlines the key accomplishments, upcoming tasks and issues to concisely inform key stakeholders. Use this template for Level 2 and 3 projects. http://www.infotech.com/research/level-2-and-level-3-project-status-report-template
	Level 3 Project Charter Template	The Level 3 Project Charter Template is used to organize the project. It communicates details about the project purpose, scope, and parameters. Use this template for Level 3 projects. http://www.infotech.com/research/level-3-project-charter-template
	Post-Implementation Review Template	The Post-Implementation Review Template is used to assess the outcome of the project by reviewing if the planned project objectives have been met. It helps you monitor the success of the project by tracking issues, benefits, costs, and customer satisfaction. http://www.infotech.com/research/post-implementation-review-template-d7f05709-51d5-4e8a-b783-d88bd0554d2f
	Post-Mortem Review Template	The Post-Mortem Review Template is used to assess the project success by reviewing major aspects of the project execution process and the final deliverables. Lessons learned and pain points are documented to create future references. http://www.infotech.com/research/post-mortem-review-template
	Post-Project Feedback Form	The Post-Project Feedback Form provides the project manager feedback on the project team members by grading their contributions. http://www.infotech.com/research/post-project-feedback-form
	Project Execution and Closing Maturity Assessment Tool	The Project Execution and Closing Maturity Assessment Tool is used to assess the maturity level of your current project initiation and planning processes. http://www.infotech.com/research/project-execution-and-closing-maturity-assessment-tool
	Project Initiation and Planning Maturity Assessment Tool	The Project Initiation and Planning Maturity Assessment Tool is used to assess the maturity level of your current project initiation and planning processes. http://www.infotech.com/research/project-initiation-and-planning-maturity-assessment-tool
	Project Management Change Impact Assessment Tool	The Change Impact Assessment Tool is to aid managers in determining the level of impact a change will have on their staff. http://www.infotech.com/research/project-management-change-impact-assessment-tool
	Project Management Processes Initiative Charter	The Project Management Processes Initiative Charter Template is used to communicate the value and rationale for creating project initiation and planning processes to key stakeholders. http://www.infotech.com/research/project-management-processes-initiative-charter
	Project Management SOP Handbook Template	The Project Management SOP Handbook Template is used to document your project initiation and planning processes as you customize these processes to fit your organization's needs. http://www.infotech.com/research/project-management-sop-handbook-template
	Project Staffing Plan	The Project Staffing Plan should be used by the project manager to determine skill requirements, assess skills, determine scheduling requirements, and draft a plan to fill resource needs. http://www.infotech.com/research/project-staffing-plan

	Quality Management Workbook	The Quality Management Workbook is used to facilitate sound quality management that monitors the status of deliverable quality throughout project execution. http://www.infotech.com/research/quality-management-workbook
	Stakeholder Communication Planning Template	The Stakeholder Communication Planning Template is used to document your list of initiative stakeholders to track stakeholders and plan communication with them throughout the initiative. http://www.infotech.com/research/stakeholder-communication-planning-template
	Stakeholder Register	The Stakeholder Register is used to record identified stakeholders and should be updated as stakeholders change as new information becomes available. http://www.infotech.com/research/stakeholder-register
	Track and Measure Benefits Tool	The Track and Measure Benefits Tool is used to monitor and track if the desired benefits have been met. Deviations in benefits are documented so a remedial action plan can be produced. http://www.infotech.com/research/track-and-measure-benefits-tool
Additional Resources		
	Change Control & Management Manager	The Change Control & Management Manager ensures that all changes are managed in a controlled manner, including standard changes and emergency maintenance relating to business processes, applications, and infrastructure. http://www.infotech.com/research/change-control-management-manager

Innovation

Type	Document	Description
Blueprint: Kick-Start IT-Led Business Innovation		
	Kick-Start IT-Led Business Innovation	IT can employ innovation to optimize and transform the way the organization operates and serves its customers – if it earns the right to contribute first. Start leading innovation now to demonstrate the art of the possible and build credibility as a strategic partner. http://www.infotech.com/research/kick-start-it-led-business-innovation
	Kick-Start IT-Led Business Innovation Storyboard – Phases 1-4	Start facilitating innovation to advance the reputation of IT and gain reputation as a true strategic partner. http://www.infotech.com/research/kick-start-it-led-business-innovation-storyboard-phases-1-4
	Idea Document	Use Info-Tech's Idea Document Template to document new ideas in a format that be easily reviewed and assessed by the innovation team. http://www.infotech.com/research/idea-document
	Prototype Assessment	Use the Prototype Assessment template to document the feedback collected from a single iteration of prototyping, and determine which feedback is vital for successive prototype iterations. http://www.infotech.com/research/prototype-assessment
	Idea Reservoir Tool	Incubate ideas in this Idea Reservoir, and use it to rank ideas based on their alignment with current organizational innovation goals. http://www.infotech.com/research/idea-reservoir-tool
	Innovation Working Group Charter	Build an Innovation Working Group to facilitate your organizational innovation initiative. http://www.infotech.com/research/innovation-working-group-charter

Type	Document	Description
	Prototyping Workbook	Use the Prototyping Workbook to plan and execute prototyping, collect evidence gathered during each iteration of prototyping, and document findings. http://www.infotech.com/research/prototyping-workbook

Leadership & People

Type	Document	Description
Blueprint: Become a Strategic CIO		
	Become a Strategic CIO	As a CIO, you are currently operating in a stable and trusted IT environment, but you would like to advance your role to strategic business partner. CIOs are often overlooked as a strategic partner by their peers, and therefore face the challenge of proving they deserve a seat at the table. Create a personal development plan and stakeholder management strategy to accelerate your career and become a strategic business partner. http://www.infotech.com/research/become-a-strategic-cio
	Become a Strategic CIO – Phases 1-4	CIOs have to act now and arm themselves with the competencies required to become a strategic business partner and earn a seat at the table with their executive peers. http://www.infotech.com/research/become-a-strategic-cio-phases-1-4
	CIO Personal Development Plan	The CIO Personal Development Plan is used to map specific activities and time frames towards competency development, with the goal of addressing competency gaps and moving your role forward. http://www.infotech.com/research/cio-personal-development-plan
	CIO Stakeholder Management Strategy Template	The purpose of the CIO Stakeholder Management Strategy Template is to document stakeholder information, and determine and track required stakeholder management actions. http://www.infotech.com/research/cio-stakeholder-management-strategy-template
	CIO Stakeholder Power Map Template	The stakeholder power map helps to visualize the importance of various stakeholders and your relationship with them so you can prioritize your time according to the most powerful and most needed stakeholders. http://www.infotech.com/research/cio-stakeholder-power-map-template
	CIO Strategic Competency Evaluation Tool	This tool should be used by CIOs wishing to assess their current competency levels for the capabilities required to become a strategic CIO. http://www.infotech.com/research/cio-strategic-competency-evaluation-tool
	CIO Strategic Competency Scorecard	The purpose of this template is to identify key performance indicators, benchmarks, and targets to track strategic CIO competency development. http://www.infotech.com/research/cio-strategic-competency-scorecard
Blueprint: Create a Culture of Recognition to Propel IT Performance		
	Create a Culture of Recognition to Propel IT Performance	Although most organizations currently have a recognition program, employees feel inadequately praised for good work. In order to reap the benefits of a recognition program, it isn't enough to just have one, it needs to be used widely. http://www.infotech.com/research/create-a-culture-of-recognition-to-propel-it-performance

Type	Document	Description
	Create a Culture of Recognition to Propel IT Performance – Phases 1-3	This blueprint walks a CIO through the development of an informal recognition program to create a culture of recognition. Improved recognition can have very positive effects on the IT department including increased engagement, improved retention, and enhanced productivity. http://www.infotech.com/research/create-a-culture-of-recognition-to-propel-it-performance-phases-1-3
	IT Recognition Workshop	Use this presentation template to help train your staff and management on the importance of recognition and to help roll out your new program. http://www.infotech.com/research/it-recognition-workshop
	Recognition Handbook	Use this template to track recognition initiatives and progress year to year. http://www.infotech.com/research/recognition-handbook
	Recognition Interview Guide	Conduct stakeholder interviews to determine key issues with respect to recognition within the IT department and evaluate root causes. http://www.infotech.com/research/recognition-interview-guide
	Recognition Personalization Survey	For recognition to have the most powerful impact, it must be personalized to the recipient. Use this survey to get to know your employees. Remember, that these answers should be used to design initiatives that people actually want to receive. http://www.infotech.com/research/recognition-personalization-survey
	Recognition Primer Email	Prepare IT staff for the assessment of recognition and the possible need for a recognition program overhaul/launch. http://www.infotech.com/research/recognition-primer-email
	Recognition Pulse Survey	Use a quick survey to evaluate the current sentiment around recognition within the IT department and gauge the feelings of the department towards current rewards and recognition initiatives. http://www.infotech.com/research/recognition-pulse-survey

What's New in Industry Research

Gaming & Hospitality Research

Type	Document	Description
Vendor Landscape: Casino Management Systems **REFRESH**		
	Vendor Landscape: Casino Management Systems	Choosing a Casino Management System (CMS) that fits the current and future requirements of the organization can be difficult within this market as differentiation can be clouded by marketing and a lack of publicly available information. http://www.infotech.com/research/it-vendor-landscape-casino-management-systems
	Vendor Landscape Storyboard: Casino Management Systems	Info-Tech evaluated six competitors in the CMS market. http://www.infotech.com/research/it-vendor-landscape-storyboard-casino-management-systems
	Casino Management Systems Vendor Shortlist Tool	This tool allows enterprises to generate a customized shortlist of casino management systems (CMS) based on required capabilities and future requirements for product features, architecture, and usability. http://www.infotech.com/research/casino-management-systems-vendor-shortlist-tool

Vendor Landscape: Food & Beverage Point of Sale Solution **REFRESH**		
	Vendor Landscape: Food & Beverage Point of Sale Solution	A point of sale (POS) solution does much more than facilitate transactions. To ensure operational efficiency and transparency, a POS solution needs advanced reporting, inventory management, integration, & loss prevention. http://www.infotech.com/research/vendor-landscape-food-beverage-point-of-sale-solution
	Food & Beverage Point of Sale Solution Vendor Landscape Storyboard	Understand the Food & Beverage Point of Sale (POS) space. Understand POS systems, their capabilities, and their limitations. http://www.infotech.com/research/food-beverage-point-of-sale-solution-vendor-landscape-storyboard
	Food & Beverage Point of Sale Vendor Shortlist Tool	Contrast and evaluate a selection of F&B point of sale solutions. Build a shortlist and select the right point of sale systems for your hotel, restaurant, casino, or resort. http://www.infotech.com/research/food-beverage-point-of-sale-vendor-shortlist-tool
Vendor Landscape: Property Management Systems **REFRESH**		
	Vendor Landscape: Property Management Systems	The Property Management System (PMS) is the most critical piece of software in any hotel, but most organizations still base their selection on what their neighbors are using. http://www.infotech.com/research/vendor-landscape-property-management-systems
	Vendor Landscape Storyboard: Property Management Systems	Info-Tech evaluated nine competitors in the Property Management Systems market. http://www.infotech.com/research/vendor-landscape-storyboard-property-management-systems
	Property Management Systems Vendor Shortlist Tool	This tool allows large enterprises to generate a customized shortlist of Property Management System (PMS) vendors based on required capabilities and future requirements for product features, usability, architecture, and integration. http://www.infotech.com/research/property-management-systems-vendor-shortlist-tool
Vendor Landscape: Revenue Management Systems **REFRESH**		
	Vendor Landscape: Revenue Management Systems	Whether maximizing RevPAR, ADR, BAR, profit, or moving away from Excel & gut instinct, a revenue management system can help you achieve that goal. http://www.infotech.com/research/it-vendor-landscape-revenue-management-systems
	Revenue Management Systems Vendor Landscape Storyboard	Understand the revenue management systems space. Evaluate revenue management systems, their capabilities, and their limitations. http://www.infotech.com/research/revenue-management-systems-vendor-landscape-storyboard
	Revenue Management Systems Vendor Shortlist Tool	Review revenue management systems providers. Build a shortlist of revenue management systems vendors for your hotel, resort or casino. http://www.infotech.com/research/it-revenue-management-systems-vendor-shortlist-tool

Native American Technology

Type	Document	Description URL
Vendor Landscape: Court & Docket Management System		
	Vendor Landscape: Court & Docket Management System	Automation of court operations is driven by the need to improve communication and ICWA compliance, and as tribes obtain funding from the Office of Tribal Justice Support and opt to establish their own court systems. http://www.infotech.com/research/vendor-landscape-court-docket-management-system
	Court & Docket Management System Vendor Landscape Storyboard	Understand the court & docket management system space, including the vendor and product capabilities and limitations. http://www.infotech.com/research/court-docket-management-system-vendor-landscape-storyboard
	Court & Docket Management System Vendor Shortlist Tool	Review court & docket management system providers and build a shortlist of vendors for your tribal court & judicial system. http://www.infotech.com/research/court-docket-management-system-vendor-shortlist-tool

What's New in Predicting the Future

Type	Document	Description
	The Alibaba IPO: The Other Side	Sometime in the next week or two, the most important event since global plates drifted apart will take place - if media coverage is any indicator. I refer, of course, to Alibaba's over-hyped initial public offering (IPO). http://www.infotech.com/research/the-alibaba-ipo-the-other-side
	Asia Letter, Q4 2014: Nation Building	It isn't impossible to understand what's happening in Asia right now; it's just difficult. http://www.infotech.com/research/asia-letter-q4-2014-nation-building
	Australia: Dancing in the Deadly Embrace	Australia's plans and politics were always driven by the big-money companies involved in resource extraction, but China's dramatic rise in demand for Australia's resources has accelerated payments in cash to this sector, while arguably slowing the country's attempts to diversify - or to do anything the major resource firms don't like. http://www.infotech.com/research/australia-dancing-in-the-deadly-embrace
	Q4 2014: The Christmas Quarter	It's hard to believe it's that time again, as we enter the most important quarter in finance and sales for the world's technology companies. One obvious lesson that comes out of the coming quarter is this: as the world changes, so does this quarter change. In a real sense, Q4 is an acutely sensitive lens on technology sales trends worldwide over the past year. http://www.infotech.com/research/q4-2014-the-christmas-quarter
	Special Letter: The Connected Car as a Platform	Everyone knows the term "the connected car," and I would guess that most of our members have already looked into its commanding role within the future Internet of Things. However, there is a deeper view available of this new mobile - and very personal - technological universe, one which required years to create and which was perhaps beyond the purview of car makers. http://www.infotech.com/research/special-letter-the-connected-car-as-a-platform

Type	Document	Description
	What Can Go Wrong: The Top 5 Threats	There are more problems than usual afoot in the world, and not without reason. While some would take the relatively ignorant view that all things are relative, nothing changes, and the world is as it always has been, I don't see things that way. I believe that actions have consequences, and we are currently paying the piper. http://www.infotech.com/research/what-can-go-wrong-the-top-5-threats
	Special Letter: Cyber Security in a Mobile World	The very infrastructure we have created as an e-commerce highway has turned out to also be the preferred path for thieves and miscreants of every kind. What now? How do we reclaim the use of this beautiful Internet project, when anyone who touches it is increasingly at risk? http://www.infotech.com/research/special-letter-cyber-security-in-a-mobile-world
	Wireless Woes: Demand Slaughters Supply	As the entire world shifts to smartphones and wireless carriers to do virtually all of their ever-increasingly mobile work, they are losing track of their costs and their benefits, and leaving a world of high-regulation for one of essentially zero regulation. They are moving from a superhighway to a jungle. http://www.infotech.com/research/wireless-woes-demand-slaughters-supply
	Digital Wellness and the Transformation of Healthcare	In this transcript of the conversation between Leroy Hood and Larry Smarr at this year's FiRe Conference, members will have a chance to fully grasp what a real revolution in modern medicine will look like. http://www.infotech.com/research/digital-wellness-and-the-transformation-of-healthcare
	Celebrating The First PRP Chip	Cognitive computing has received an increasing amount of attention recently, as those who have been touting the Big Data problem/opportunity have come up against the rather obvious challenge: how to deal with it most effectively? http://www.infotech.com/research/celebrating-the-first-prp-chip
	Asia Letter, Q1 2015: Japan: Arms Dealer to the Cellphone Wars	In this issue, Asia Editor Scott Foster brings us a clear picture of how Japan and other Asian nations are building new partnerships and programs around the hottest technology platforms in the world (smartphones) and the newest markets (Myanmar). http://www.infotech.com/research/asia-letter-q1-2015-japan-arms-dealer-to-the-cellphone-wars
	From Social to Science: The Next Trends in Investing	During our 10th Annual Predictions Dinner in New York, I had the good fortune to be able to talk with Doug Jamison, CEO of Harris & Harris Group, about his firm's commitment to investing in deep science – quantum computing, new materials like graphene, and much more. http://www.infotech.com/research/from-social-to-science-the-next-trends-in-investing
	The Top 10 Predictions for 2015	Before we move into this year's Top 10, let's set the landscape these will play upon. http://www.infotech.com/research/the-top-10-predictions-for-2015
	CES and the IoT	This week, as 160,000 vendors, buyers, and spies roam the aisles of the Consumer Electronics Show (CES), it seemed like the right time to write about the Internet of Things (IoT) again, using examples from CES to illustrate the creative, exciting ways in which things will talk to, and work with, other things, often with little or no human input. http://www.infotech.com/research/ces-and-the-iot

Type	Document	Description
	Special Letter: On the Commercialization of Graphene and Other Nanomaterials	We have been writing about graphene's potential for many years now. As members know, I am on the Advisory Board of the Graphene Stakeholders Association and, more recently, of the first Graphene Center of Excellence. So, we have put our time and money where our publications have been, working to understand and accelerate the commercialization and market uptake of this most amazing material. http://www.infotech.com/research/special-letter-on-the-commercialization-of-graphene-and-other-nanomaterials
	The Ultimate Biocomputer: Brain or Cell?	If we are to understand brains well enough to create brain-inspired technologies, we need to understand their process of self-assembly, as well as how neurons work. Today, one might add, it is only the latter which has been successfully translated into our latest chips. http://www.infotech.com/research/the-ultimate-biocomputer-brain-or-cell
	A Centerpiece Conversation with Mark Hurd	Mark Anderson interviewed Oracle CEO Mark Hurd, and the two cover such topics as cloud computing, Platform as a Service, security, data center management, and hardware and software optimization. http://www.infotech.com/research/a-centerpiece-conversation-with-mark-hurd
	Technology and the Global Economy: Predictions for 2015 Landscapes	I really love doing this stuff, as you all know. I try to do it in two different ways. I try to talk about the landscapes we're looking at first, kind of give a shared view of what's going to happen, both in terms of economies and technology; and then I will talk about actual predictions. But I'll be predicting things the whole time. http://www.infotech.com/research/technology-and-the-global-economy-predictions-for-2015-landscapes
	What Will Go Wrong: A Cyber Warning	I asked my friend Joi Ito, now head of the MIT Media Lab, what he thought of a certain Japanese prime minister. Without a moment's hesitation, he answered: "BM, or AM?" When I didn't get it, he explained: Before the Motorcade, or After the Motorcade? http://www.infotech.com/research/what-will-go-wrong-a-cyber-warning
	Special Letter: An Innovator's Handbook: Dealing with the FDA	We have been delving into the future of biology, genetics, healthcare, evolutionary theory, biofeedback systems, neurophysiology, brain-inspired computing, the Quantified Self, and medical software and devices for at least a decade. But nowhere during this thread have we touched on what is often the life-or-death issue for entrepreneurs in these arenas: dealing with US regulatory agencies. http://www.infotech.com/research/special-letter-an-innovator-s-handbook-dealing-with-the-fda
	My (Fake) Interview with Apple CEO Tom Cook	A lot of people are wondering about Apple these days, and so when I found CEO Tom Cook alone in the corner of a Taco Bell just off California Highway 17, I realized it was my chance in a thousand to ask all of those questions everyone wants to ask but are usually afraid to. http://www.infotech.com/research/my-fake-interview-with-apple-ceo-tom-cook
	Currency Wars II: The Isolated Dollar	This week, we'll look at the causes behind the strong dollar, and, by establishing a clear understanding of this important financial trend, we'll extend our abilities to see what's coming in light of this global shift. http://www.infotech.com/research/currency-wars-ii-the-isolated-dollar
	Asia Letter, Q2 2015: The UK and Germany Go with China	In this issue of the quarterly Asia Letter, Scott Foster has captured the new momentum shift happening as China moves to expand its influence and the UK and Germany jump on board. http://www.infotech.com/research/asia-letter-q2-2015-the-uk-and-germany-go-with-china

Type	Document	Description
🗋	Special Alert: The US Moves Against Crown Jewel IP Thieves	Since we first identified the issue of state-sponsored theft of crown jewel IP as a threat to inventing companies, countries, and the global economy, we have been working hard to bring this issue forward in both international recognition, and national responses. http://www.infotech.com/research/special-alert-the-us-moves-against-crown-jewel-ip-thieves
🗋	The Destruction of the Smartphone Sector?	Most of today's technology leaders would say that smartphones represent the most dynamic, and most strategic, sector on the global economic landscape. Just as the telecommunications equipment sector was red-hot during the initial buildout of the Internet, today all of the action - and a large share of the money - is at the edge, in handheld devices. http://www.infotech.com/research/the-destruction-of-the-smartphone-sector
🗋	Special Letter: The Maker Movement	Too often, we leaders in the technology world become obsessed with what might someday be done on the bleeding edge of our engineering abilities, rather than focusing on what can be done tonight with the technology at hand. Mick Ebeling has made a life out of doing the opposite: taking existing tech and enriching lives around the world, always at an amazingly lower cost. http://www.infotech.com/research/special-letter-the-maker-movement
🗋	10 Global Tech Trends Off the Mainstream Radar	I am often asked: "What are you watching now?" This is a tougher question than it may seem, when one is watching hundreds of threads, in a larger number of pattern streams, with an overwhelming amount of detail. This week, I thought I'd boil down my current list to 10 and share them with our members, who will hopefully find them as important and interesting as I. http://www.infotech.com/research/10-global-tech-trends-off-the-mainstream-radar
🗋	From Finches To Hawking: Giving Voice To The Brain's Whispers	In a world full of interesting people, Philip Low stands out. With expertise ranging from neuroscience to mathematics, physics, electronics, business, and - close to all of our hearts - the brains of killer whales and other animals, Philip has managed to craft a career for himself that melds these into great work, great products, and high-impact discoveries. His goal: to help everyone from Stephen Hawking to big-pharma test-animals in having better lives. http://www.infotech.com/research/from-finches-to-hawking-giving-voice-to-the-brain-s-whispers
🗋	10 Global Economic Trends Off the Mainstream Radar	Two weeks ago, we looked at technology trends that were important, and likely off the radar of members; this week, we are going to do the same with the economy. http://www.infotech.com/research/10-global-economic-trends-off-the-mainstream-radar
🗋	Security, Risk, and Software	The reason I'm here this morning is to talk to you mostly about intellectual property protection: how it might apply to you in your own work, and maybe some views of it that you don't have yet. http://www.infotech.com/research/security-risk-and-software
🗋	Special Letter: The New Power Game	Simon Hackett is probably the best-known entrepreneur in Australia. In this issue, Simon shares with us his research on how to solve the grid battery challenge, and why flow batteries are the best solution. http://www.infotech.com/research/special-letter-the-new-power-game
🗋	Pattern Recognition: AI for the Next IA	The power of IAs is not in how human we can make them seem. This, alone, properly understood, will take us far in understanding where IAs are headed in the long term. http://www.infotech.com/research/pattern-recognition-ai-for-the-next-ia

Type	Document	Description
🗋	Special Letter: Frictionless Commerce	In this discussion, our members will learn how our voices can become the centerpiece for e-commerce security. Is this achievable? Indeed, it is more likely inevitable. http://www.infotech.com/research/special-letter-frictionless-commerce
🗋	At 20	Twenty years ago this week, I emailed the first issue of this report to a long list of friends and colleagues. The first issue focused on IBM's hostile takeover offer for Lotus. http://www.infotech.com/research/at-20
🗋	Asia Letter, Q3 2015: Asia On The Move	In a week when the president's own party has turned against his most important geopolitical and economic project, the Trans Pacific Partnership, our Asia Editor Scott Foster has done us the terrific service of providing context from the Asian side of the Pacific. http://www.infotech.com/research/asia-letter-q3-2015-asia-on-the-move
🗋	The Perfect Union: Biology and Computing	In this week's discussion, we're going to look at how biology will inform computer design - and how compute systems will change biology. http://www.infotech.com/research/the-perfect-union-biology-and-computing
🗋	The Graphene Revolution: The Good, the Bad, and the Ugly	It seems as though hardly a week goes by without a new scientific discovery about graphene's growing list of electrical, chemical, and physical properties, and of their potential commercial applications. http://www.infotech.com/research/the-graphene-revolution-the-good-the-bad-and-the-ugly
🗋	The Next FiRe	This week, Mark Anderson has picked a few key (non-biological) aspects to the FiRe conference that he thinks stand out as long-term threads in his report, and which are now breaking new ground. http://www.infotech.com/research/the-next-fire
🗋	Special Letter: Designing the Next Internets	Most informed telecoms engineers (and technically sophisticated Net users) have come to the conclusion that security on the Internet, as it's designed today, ranges from the impractical to the impossible. http://www.infotech.com/research/special-letter-designing-the-next-internets
🗋	National Security	I recently had the opportunity to listen and talk with many of the national leaders in defense, intelligence, and security, from the US and several of its key allies and opponents. These meetings and discussions brought out their current key interests and concerns. Perhaps top among these was the gap between the technology industry and the national security establishment. http://www.infotech.com/research/national-security
🗋	Unlocking the Value in the Internet of Things Ecosystem	This week, as we complete our agenda for FiRe 2015, seemed a perfect time to publish Eric's and John's most recent FiRe conversation, perhaps more relevant now than ever, on the security and technology behind the growth of the (Industrial) Internet of Things. http://www.infotech.com/research/unlocking-the-value-in-the-internet-of-things-ecosystem
🗋	The ERaCha Era: Living on the Edge of Radical Change	This rate of change is exponential, and for that reason, almost impossible for us to grasp. I thought it would be useful to first recognize this moment's importance, as we stand on a true precipice facing radical changes in almost everything around us - and then provide a brief attempt at describing what's coming next. http://www.infotech.com/research/the-eracha-era-living-on-the-edge-of-radical-change

Type	Document	Description
	Undiagnosed: Why is the Future of Medicine Being Ignored?	This week's discussion combines the most advanced areas of medical discovery with the personal challenges that come with living just beyond the edge of today's medical knowledge. http://www.infotech.com/research/undiagnosed-why-is-the-future-of-medicine-being-ignored
	Q4 2015: The Christmas Quarter	I was tempted to write something more on China this week, given the effect of that nation's destabilizing economic situation on global equity markets; and in fact, it now seems that we should offer perhaps two future issues: The CEO's Guide to China and The Investor's Guide to China. http://www.infotech.com/research/q4-2015-the-christmas-quarter
	Asia Letter, Q4 2015: China Inflection Point	We would like to thank Scott Foster for continuing to provide all of us with detailed views of Asian technology and business strategic moves that are often not carried by Western – or any – media sources. http://www.infotech.com/research/asia-letter-q4-2015-china-inflection-point
	A Gathering of Substance	What would happen if you got the best people in the world in neuroscience, stem-cell research, chip design, software, satellites, transportation, broadband, big-data visualization, bioacoustics, animal language, documentary film, interactive entertainment, pattern recognition, and put them together in one room for three days, in a five-diamond lodge, in the world's most beautiful ski resort? Magic. http://www.infotech.com/research/a-gathering-of-substance
	Special Letter: Supercharging Big Data Research	In this week's issue, members will get a view of a completely new computing environment, from Pattern Recognition Processors out to a new secure Net running as a multi-institution backplane across a whole state, at real measured speeds of 100 Gbps. http://www.infotech.com/research/special-letter-supercharging-big-data-research
	The China Short	Having been among the first (if not the first) to suggest that the Chinese national economy is crashing, it seemed appropriate that we take a closer follow-on look at which companies and countries are most at risk should our observations and predictions be correct. http://www.infotech.com/research/the-china-short

Introducing Info-Tech Express

Managing Projects

Type	Document	Description
Blueprint: Formalize Project Portfolio Management for Small Enterprise		
	Formalize Project Portfolio Management for Small Enterprise	Small enterprise IT leaders face unique challenges when it comes to successfully executing projects. Increase the manageability and value of your IT projects with a PPM strategy that is right-sized to meet your particular challenges and capabilities. http://www.infotech.com/research/formalize-project-portfolio-management-for-small-enterprise
	Formalize Project Portfolio Management for Small Enterprise – Phases 1-2	Make big gains in small steps. http://www.infotech.com/research/formalize-project-portfolio-management-for-small-enterprise-phases-1-2

Type	Document	Description
	Portfolio Operating Plan for Small Enterprise	Use this template to document decisions, policies and procedures around your portfolio operating plan. http://www.infotech.com/research/portfolio-operating-plan-for-small-enterprise
	PPM for Small Enterprise Resource Allocation Implementation Guide	This implementation guide offers detailed step by step instructions for setting up the resource management aspect of the PPM solution. This includes resource allocation, resource capacity and resource forecasting. http://www.infotech.com/research/ppm-for-small-enterprise-resource-allocation-implementation-guide
	PPM for Small Enterprise Setup Implementation Guide	This implementation guide offers detailed, step-by-step instructions for setting up Info-Tech's portfolio workbook templates. http://www.infotech.com/research/ppm-for-small-enterprise-setup-implementation-guide
Blueprint: Express – Managing Projects		
	Express – Managing Projects	Info-Tech Express offers comprehensive bundles of tools and templates that will help you get to action quickly on your most important projects. http://www.infotech.com/research/express-managing-projects
	Express – Managing Projects Implementation Guide	This Info-Tech Express implementation guide provides an overview of the Project Management Toolbox. http://www.infotech.com/research/express-managing-projects-implementation-guide
	Approval Template	At this stage, the project prioritization committee must communicate resource-confirmed project rankings with stakeholders and senior management to obtain support for moving forward. http://www.infotech.com/research/approval-template
	Capture Basic Project Information Template	Use this template to document basic project information. Create it at the start of the project, when key elements are defined and submitted for approval. http://www.infotech.com/research/capture-basic-project-information-template
	Change Approval Form	This approval template provides a format that will indicate the top-ranked projects that have been identified to proceed, and suggest a format for obtaining official stakeholder and senior management approval. http://www.infotech.com/research/change-approval-form
	Email Approval Template	The project prioritization committee must communicate project rankings to senior management and obtain support for moving forward. http://www.infotech.com/research/email-approval-template
	Email to Project Managers Template	This email template is designed to inform project managers that a portfolio monitoring exercise is taking place and that their involvement is required in the process. http://www.infotech.com/research/email-to-project-managers-template
	Guide to Defining a Project	This guide is designed to help set expectations for how projects are defined by the organization. Its purpose is to help establish what constitutes a project and to help users distinguish a project from common operational work and non-project activities. http://www.infotech.com/research/guide-to-defining-a-project
	Guide to Understanding Triggers for Re-Prioritization	This guide should be used to identify circumstances in which re-prioritization of projects may be required. http://www.infotech.com/research/guide-to-understanding-triggers-for-re-prioritization

Type	Document	Description
	Light Project Management Process Guide	This document is intended to aid project managers and staff through the process of light, yet structured project management associated with a single project. http://www.infotech.com/research/light-project-management-process-guide
	Project Prioritization Resource Alignment Master	This tool has been designed to help you determine where resource gaps lie for your prioritized projects. Identifying required staff and budget constraints will help you see which projects can proceed, and which projects may need adjustments. http://www.infotech.com/research/project-prioritization-resource-alignment-master
	Master Tool Frequently Asked Questions	Use this document to address some frequently asked questions regarding the Project Prioritization Resource Alignment Master. http://www.infotech.com/research/master-tool-frequently-asked-questions
	Performance Feedback Form	Use this feedback form to assess and provide professional and constructive feedback to project team members. http://www.infotech.com/research/performance-feedback-form
	Portfolio Monitoring Dashboard	This tool has been designed to record, display, and analyze a project portfolio containing up to 100 projects. It requires data from each project manager so that management can review progress and statistics across the portfolio. http://www.infotech.com/research/portfolio-monitoring-dashboard
	Portfolio Monitoring Process Guide	Portfolio monitoring is concerned with regular visibility into the total set of projects underway across the organization. This document is designed to take managers through a structured process for managing and reporting progress across multiple projects. http://www.infotech.com/research/portfolio-monitoring-process-guide
	Project Acceptance Form	Use this form to obtain sign-off that the project has been completed, deliverables have been received, and the results are accepted. http://www.infotech.com/research/project-acceptance-form
	Project Prioritization List Maintenance Guidelines	Use this guide to help establish your own Prioritization List Maintenance Plan with the objective to monitor and sustain your project list by continuously examining, tracking, updating, evaluating and, in some cases, re-prioritizing projects and investments of IT resources. http://www.infotech.com/research/project-prioritization-list-maintenance-guidelines
	Project Prioritization Process Template	This advanced guide is designed to assist in establishing and defining the project prioritization process. For organizations that warrant a formal process document, this guide will help to define the prioritization exercise charter and rules of engagement. http://www.infotech.com/research/project-prioritization-process-template
	Project Re-Prioritization Master Tool	Due to an identified event, the prioritization list you have determined to date no longer reflects current realities. Use this tool to help you re-adjust, and consequently, re-prioritize projects. http://www.infotech.com/research/project-re-prioritization-master-tool
	Project Request Process	This template is designed to inform people inside the organization that a project prioritization exercise is taking place. http://www.infotech.com/research/project-request-process
	Project Sponsor Meeting Agenda Template	After each project team meeting, use this template to set the agenda for the project manager's meeting with the project sponsor. http://www.infotech.com/research/project-sponsor-meeting-agenda-template

Type	Document	Description
	QA Checklist for Feasibility Studies Guidelines	Feasibility study stakeholders and reviewers should use this checklist to ensure that the quality of the final report follows corporate standards and meets stakeholder approval. http://www.infotech.com/research/qa-checklist-for-feasibility-studies-guidelines
	IT Cost-Benefit Analysis Tool	Cost/Benefit Analysis is an important part of any project viability assessment. Use this tool to gain insight into the pros and cons of the IT projects under consideration. http://www.infotech.com/research/it-cost-benefit-analysis-tool

Planning IT Strategy

Type	Document	Description
Blueprint: Build an IT Strategy for Small Enterprise		
	Build an IT Strategy for Small Enterprise	The project blueprint will help small enterprise IT leaders understand their corporate strategy and develop an IT strategy that meets organizational goals. http://www.infotech.com/research/build-an-it-strategy-for-small-enterprise
	Build an IT Strategy for Small Enterprise – Phases 1-3	This project blueprint will help small enterprise IT leaders understand their corporate strategy and develop an IT strategy that meets organizational goals. http://www.infotech.com/research/build-an-it-strategy-for-small-enterprise-phases-1-3
	IT Strategy Deck	The IT Strategy Deck will help small enterprise IT leaders organize their strategy quickly, and show how it aligns to organizational goals to garner support for IT. http://www.infotech.com/research/it-strategy-deck

Managing IT

Blueprint: Build a Right-Sized Service Desk for Small Enterprise		
	Build a Right-Sized Service Desk for Small Enterprise	The service desk is the cornerstone of end-user satisfaction. This project will help small enterprise IT leaders put light processes in place to improve the effectiveness of the service desk without eating up the department's resources. http://www.infotech.com/research/build-a-right-sized-service-desk-for-small-enterprise
	Build a Right-Sized Service Desk for Small Enterprise – Phases 1-3	Light, sustainable service desk processes can help small enterprise IT shops improve business satisfaction, decrease recurring issues, increase efficiency and lower cost to serve, and enhance demand planning. http://www.infotech.com/research/build-a-right-sized-service-desk-for-small-enterprise-phases-1-3
	IT Service Management Demo Script Template	Use this demonstration script to provide service desk solution vendors with a consistent set of instructions, ensuring an objective comparison of product features. http://www.infotech.com/research/it-service-management-demo-script-template
	Knowledgebase Article Template	Use this template to get your service desk team writing knowledgebase articles. http://www.infotech.com/research/knowledgebase-article-template

	Service Desk Action Plan Roadmap	Use this roadmap to identify and prioritize tasks that you need to complete as you work to improve your service desk. http://www.infotech.com/research/service-desk-action-plan-roadmap
	Service Desk Executive Presentation	Improving service desk processes requires the cooperation of key stakeholders. Use the executive presentation to provide an overview of the project, its objectives, and the anticipated benefits. http://www.infotech.com/research/service-desk-executive-presentation
	Service Desk Software and RFP Evaluation Tool	Use this tool to evaluate and compare the results of an RFP process quickly and easily. http://www.infotech.com/research/service-desk-software-and-rfp-evaluation-tool
	Service Desk Ticket Classification and Dashboard Tool	This tool is designed to help you classify and analyze closed service desk tickets. Use the information to analyze your classification scheme and make the case for a service desk tool. http://www.infotech.com/research/service-desk-ticket-classification-and-dashboard-tool
	Service Management Standard Operating Procedure	The service management standard operating procedure establishes the procedures for processing service desk tickets effectively. http://www.infotech.com/research/service-management-standard-operating-procedure