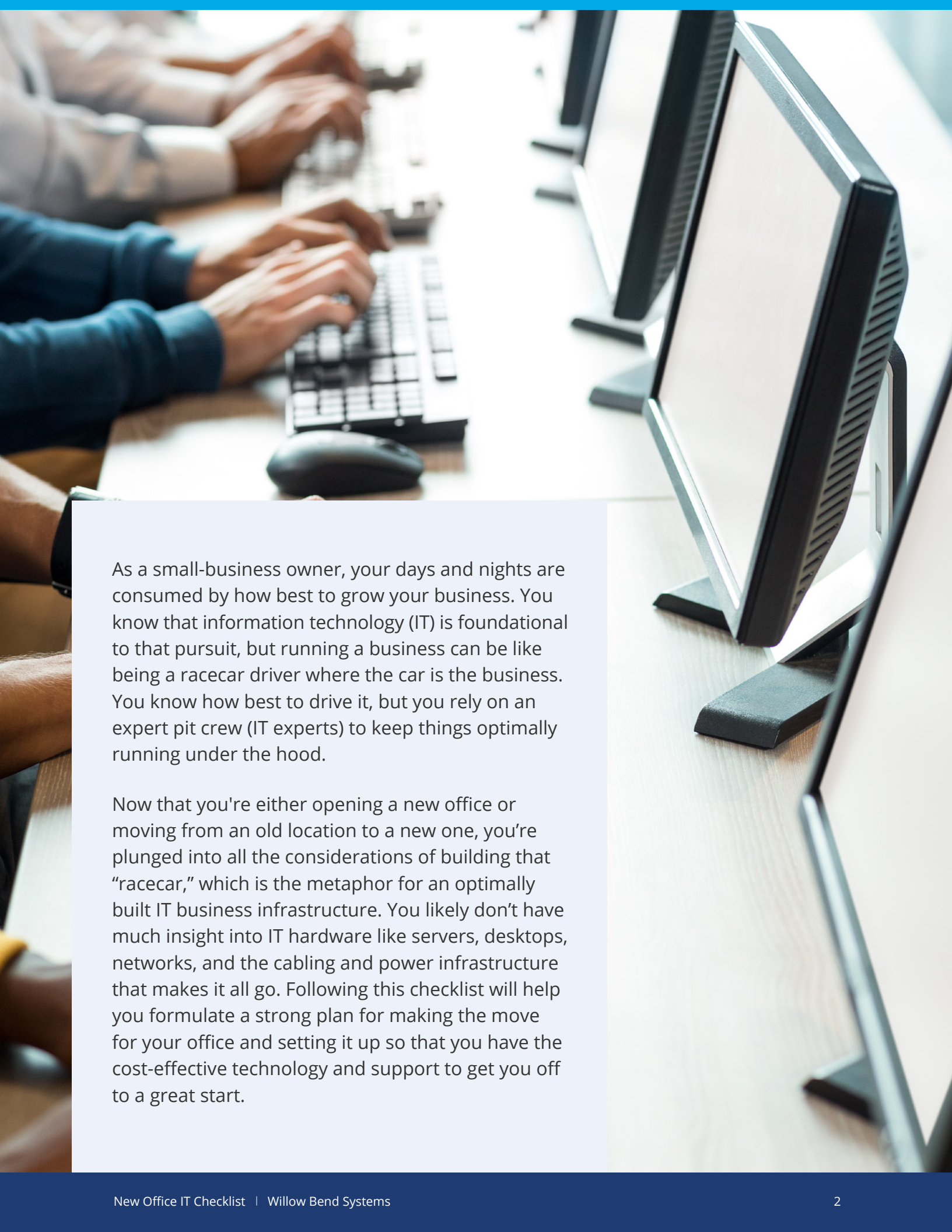




# New Office IT Checklist

———— A Willow Bend Small-Business Guide ————





As a small-business owner, your days and nights are consumed by how best to grow your business. You know that information technology (IT) is foundational to that pursuit, but running a business can be like being a racecar driver where the car is the business. You know how best to drive it, but you rely on an expert pit crew (IT experts) to keep things optimally running under the hood.

Now that you're either opening a new office or moving from an old location to a new one, you're plunged into all the considerations of building that "racecar," which is the metaphor for an optimally built IT business infrastructure. You likely don't have much insight into IT hardware like servers, desktops, networks, and the cabling and power infrastructure that makes it all go. Following this checklist will help you formulate a strong plan for making the move for your office and setting it up so that you have the cost-effective technology and support to get you off to a great start.





## Building Your Team

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Just as you built your workforce team, you need to assemble a team for your new business move. You'll need certain team members, and you'll need to ensure that they have the skills and the support to accomplish their mission:

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- You'll need a manager/coordinator to facilitate the move or setup and ongoing maintenance. An office manager may be the ideal person to take on this role, as he or she has daily contact with all departments and everyone on the workforce. The idea is to pick someone with first-hand knowledge of your business in terms of a current/proposed office. This means an idea of needs for the phone system, computers, and business technology like faxes and printers.
- Assemble an internal team for preparing all non-IT items for the move. This can be as few as one or two people for a very small office and up to four or five people who represent different departments. They will work with the coordinator to identify gaps. While the coordinator will have some basic understanding of IT needs, he or she will by no means have the in-depth IT understanding necessary to make it all happen.
- Although you may have some form of internal IT support, it's likely that you don't have the affordable and capable technical support that you need to handle all your needs. Budgets are always tight, so outsourced IT provides a team of skilled IT experts and generalists at a fraction of the cost of a full-time or even part-time IT staffer. You'll pay a set fee for all the IT services per month with outsourced IT rather than per-hour costs of an IT staffer.

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- You'll need to clearly define roles and responsibilities for the team: As an advisor, a skilled and experienced managed IT services provider (MSP) can work in concert with your coordinator (as well as any internal IT) to assemble the needs for the new office IT infrastructure. This would include timelines, investment costs, timetables for the move and installation, and any testing or training that may be necessary.
- The coordinator is the point person for all timetables to keep everyone informed of the move and setup process. This would be coordinated with any office-equipment movers or delivery of any new equipment or furniture.
- The MSP would handle coordination of all IT equipment, either existing or new, as part of the overall move schedule that it helps devise.



## Current Equipment and Service Inventory

- Inventory all equipment to determine if it still meets your needs and will be suitable in the new location.
- List any equipment that needs upgrading or replacing and order any necessary equipment.
- Return any leased IT and phone equipment that is no longer needed.
- Properly dispose of old or broken equipment.
- Evaluate server-room requirements.





## Evaluate Infrastructure Needs



### Hardware

Your business will run on a specific amount and type of IT hardware, but it can be difficult for you to know what is needed, what you have that will work, and how it all fits together. Here is a quick checklist of questions that you and your team must consider:

- Network configuration needs (client/server or peer-to-peer) servers, storage, switches/routers, firewalls, and other appliances or cloud services, which may be the best option
- Cloud desktops (DaaS) or standard desktops
- What peripherals are required (printer, fax/scanner, uninterrupted power supplies, multifunction units, audiovisual products)
- Mobile technology – netbooks, tablets, smartphones



### Software

Your business processes all require software, which requires several decisions. The following checklist covers potential software and options for securing it for your business:

- Office applications
- Accounting software
- Customer relationship management
- (CRM)/marketing software
- Customer service/order/ticket management
- Inventory management
- ERP
- Antivirus software

Most of these software solutions can be part of a cloud services solution such as Office 365, where software as a service (SaaS) can be cheaper and more scalable than traditional software.





## Desktop as a Service

Desktop as a service (DaaS) is a cloud service where all the functionality (operating system, applications, and storage) of desktops is stored and hosted by a cloud provider. In this subscription model, the service provider manages the back-end responsibilities of data storage, backup, maintenance, security, and upgrades. Consequently, DaaS:

- Reduces hardware costs
- Maximizes workstation lifecycles
- Provides scheduled/automated software updates
- Delivers remote monitoring for maximum uptime
- Delivers centralized data control, security, centralized backup, and disaster recovery
- Enables a mobile workforce via any digital device with application and collaboration access in real time with the added ability of employees to work anywhere



## Data Storage

While an on-site server or external drive is in your control, it's vulnerable to on-site disasters and can be very costly and labor-intensive. Ease of use is one of the main advantages of cloud solutions for data storage.

With cloud services for data storage, backups can be automated and conveniently scheduled, which eliminates ongoing maintenance and capital expenditure costs that you face with hardware. It requires far less investment than on-site storage and can be scaled up or down depending on needs. It also enables remote access for a mobile workforce.







## Cloud Services

Cloud services for data storage and application hosting can provide convenience, predictable costs, security, and a host of other benefits for an affordable monthly fee (subscription). These services can include:

- Compute (where you can run your applications and virtual servers)
- Web and mobile, along with application development and other tools
- Data analytics, along with networking
- Media and content distribution networks
- Identity and access management (IAM) and Security

“ Organizations of all sizes can reap the benefits offered by virtualization. ”



## Virtualization

Servers are a critical component in IT infrastructure, but is it best to have them on site or to make them virtual servers? Virtualization enables server consolidation and therefore savings plus a wealth of other benefits over on-premises. Organizations of all sizes can reap the benefits offered by virtualization. In fact, according to the 2017 State of IT report by Spiceworks, [76 percent of respondents are currently leveraging server virtualization.](#) There are some important considerations for virtualization, which include:

- Virtualization is most effective with businesses needing five to seven on-site servers, with 10 to 15 servers being the point of best ROI. If you have need for fewer than five servers, it may be best to look at on-site servers or a storage area network.
- Storage capacity (at least 40 GB per user).
- Think about setting up failovers to ensure the security of your virtual system.

## Data Backup

You need to back up your business data to a secure location, but should you use hardware or a cloud-based solution? Either way, you must make decisions about:

- Regulatory compliance needs (HIPAA, PCI) for data safety
- Data encryption needs and other security testing/services to ensure system strength/protection against attacks
- IAM software for system and physical access security

## Phones

When it comes to phones as part of your communications infrastructure, you should consider present needs, as well as growth and expansion over the next five years. Other major considerations include:

- Cloud-hosted PBX/VoIP or personal/mobile phones only
- Number of users
- Long-distance/international calling needs
- Important calling features (hunt groups, reporting, flexible on-hold options, online voicemail access/user interface, etc.)
- Traditional/video conferencing in conjunction with the phone system or part of a cloud service





## VoIP requires:

- Sufficient bandwidth
- A proper switch and router
- Quality of service, which ensures that voice traffic will be separated from regular Internet users to ensure high call quality
- Voice-over-IP (VoIP) equipment options, including digital office phones, softphones, headsets, and telephone adapters
- VoIP may require a battery backup system and possibly a power-over-Ethernet switch if power is lost
- Determining the number of simultaneous users with VoIP and video conferencing, which will determine bandwidth needs for your Internet usage



## Network

Choosing network services that are reliable, secure, and high-performance is critical for success. Some things to consider when making network decisions are:

- Network needs in terms of data use
- Number of employees and their network needs
- Wireless Internet access and capacity needs
- Secure, remote network access (virtual private network, or VPN) needs
- Private network/point-to-point services for compliance purposes
- Data center/colocation facility connection needs (cloud services)
- Employee mobile Internet access requirements
- Internal apps and/or SaaS apps needing support (ERP, Salesforce, financials)
- VoIP support



## Planning and Preparing For New Office Setup

At least two months before the move, a site visit with your IT provider is essential in planning for a successful move. This enables you to:

- Schedule move date(s)
- Coordinate IT and moving resources
- Ensure the ideal locations for workstations, power jacks, and network cabling points
- Decide prime location(s) for printers, scanners, routers, etc.
- Confirm if the minimum requirements for the server room will be met (electrical, cooling, dimensions, and security) if applicable rather than going with cloud services
- Complete buildout work if needed
- Define telecom equipment needs and location



### Email

Because this is one of the most critical business functions, it is important to consider the following:

- How many email accounts?
- What size/storage requirements do you have for your emails?
- Will you host in-house, using a third party, or in the cloud?
- Will you be integrating email with other apps like CRM, ticketing, or ERP?
- Will you need archive or backup and recovery services for your emails?
- Will you need instant messaging capability?







## IT Services and Outsourced Support

The support of an MSP can be the foundational element that ensures all aspects of your new office IT infrastructure are handled efficiently, correctly, and cost-effectively. Whether you have some or no internal IT support, they can become part of your team that provides the consultation support to make sure that your business is ready for present and future needs.

With access to external technology experts who are constantly available to monitor and fix company networks and handle all aspects of IT, your business can reap the MSP benefits of having a large IT team at very little cost. They are best positioned to handle all aspects of your new office IT move and implementation, as well as ongoing support, including:

- Make backup copies of all company data systems, including firewalls and servers, and store copies where they will not be affected by the move.
- Ensure full recovery is possible so that if something does go wrong, you'll still be able to access all your company's important data.
- Set up or modify your network for new printers, workstations, and other hardware.
- Install and test new cabling workstations, phones, VoIP, VPN, security software, printers, and other hardware.
- Start all servers and test network capability and data migration.
- Simplify IT operations.
- Improve and monitor network reliability.
- Choose and implement technology solutions that increase productivity.

“Your business can reap the MSP benefits of having a large IT team at very little cost.”

While these are just a fraction of what an MSP can provide before, during, and after a new office IT move, the peace of mind and asset monthly costs may be the most attractive to a business owner. The goal of managed IT services is to make IT transparent so that you and your workforce can stay focused on growing the business.

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## About Willow Bend Systems

Preparing for your next big business move? At Willow Bend Systems, we leverage your existing technology to develop IT solutions that work for you. With managed IT services, infrastructure hosting, IT hardware sales, and IP phone systems, we deliver comprehensive, streamlined IT solutions that help you focus on your clients, not your technology.

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