Channel Checklist: How to align IT assessments with business needs

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Service provider takeaway: *The key to a successful IT assessment is aligning it with your client's business needs. This Channel Checklist provides tactical advice on how to do so.*

Regardless of the technology you work in, experts almost always recommend the same first step when starting a new project: performing an IT assessment with an eye on your client's business needs. While the specific details of that assessment are different for, say, a VoIP implementation and a CRM project, the process of building the business case often starts the same way. This checklist will help you make sure you talk to the right people in the right way to get your project approved.

✓ IT assessments answer 'why,' not 'how'

If you're starting off by pitching your solution, you're skipping a crucial step: identifying the problem. Most clients won't adopt new technology just on the "wow" factor, so before you go into a new technology's features, talk about the existing system's weaknesses. When possible, try to tie those weaknesses to real dollars to show how much money the client could save by addressing them.

This step will, of course, differ from technology to technology. A VoIP consultant may point out a client's high long-distance bills, for instance, while a disaster recovery consultant will focus on the cost a company would incur in a disaster.

✓ Look beyond the IT department

If your client has an IT department, it's a given you'll be working with them. But make sure to talk to other people in the company, too. Almost any project is going to affect someone outside of IT -- even if it's just a matter of a server being down for some time -- and a company's IT staff isn't always attuned to the needs of other departments.

For instance, IT might want to do server maintenance on a weekday so they don't have to come in on a weekend and possibly have to pay overtime, but C-level management may not want services down during those hours.

✓ Identify an ally in the company

With luck, one of your first contacts at a company will be someone who is excited about the project and will champion it on your behalf, said Bob Ritter, president of GoldMine CRM reseller FirstDirect, in Hopewell Jct, N.Y. If that's the case, ask that person who else is involved in the project and for help in navigating the company's hierarchy. Get those people's contact information, and be persistent; some people respond better to phone calls, others to emails or faxes.

✓ Identify the decision makers

Your first contact at a company isn't always deeply involved in the project; sometimes it's a secretary on a fact-finding mission or a manager who won't actually be involved in the decision-making process. A person's title isn't always indicative of their role in the project, so you should ask.

Find out who will make the actual purchase, and speak to them. Many companies have someone in charge of accounts payable; larger enterprises may have a purchasing department. It's possible that you could spend time with managers and sell them on the project, but the purchasing department then goes and finds another reseller or consultant at a lower price. Having a good relationship with that group can lower that risk, said Ritter.

✓ Talk to end users

We've all seen a project that was a good idea but didn't end up being used day-to-day for whatever reason. If the product you're working on is something that end users will work with, like a CRM or ERP system, try to talk to them. Developing your product with end users' needs in mind will give it a better chance of actually being used, which will translate to greater satisfaction with your services and a better chance of repeat business. If you've got that ally within the company, that person may be able to put you in touch with a few end users.

✓ Alleviate IT's concerns

Unless your client has no IT department, some of its employees may worry that you're being brought in to replace, not complement, them. This is especially true with more disruptive technologies, such as managed services or Software as a Service (SaaS), which eliminates the need for many on-site servers. Executives often trust their IT staff and are wary of hurting morale, so it's important to get those employees on your side.

If you sense resistance from your client's IT staff, assure them that your role is limited to the project at hand. If the project involves a long-term relationship with the client, as in managed services, show them how you can free up time and money so that they can work on larger projects instead of putting out fires.

✓ **Keep an eye out for more opportunities**

Many projects require a fairly extensive IT assessment in their initial phases, and that provides a great opportunity to cross-sell your services. For instance, most VoIP vendors require you to qualify your client's IT infrastructure before you install the VoIP system. Watch for anything that could lead to a new project, even if it's not immediately vital. If you mention now that your client may need to upgrade its storage in a year, that pitch could be easier when the time comes -- and you'll stand a better chance of getting the deal.