

ADVISORY SERVICES

IT Infrastructure Assessment & Roadmap Report

Your Path to a Scalable, Secure, and High-Performing IT Future

Roadmap Overview

Is your IT environment built to support your business today and scale for tomorrow?

Our IT Infrastructure Assessment & Roadmap is a comprehensive, strategic engagement that delivers a clear-eyed view of your IT operations, infrastructure, and governance. We identify what's working, what's not, and what's next so you can reduce risk, boost performance, and support long-term growth.

Gain a clear understanding of how your IT stack supports—or hinders—your strategic goals. Walk away with a tactical, future-ready plan to modernize, secure, and streamline your IT environment with confidence.

Deliverables

You'll receive a third-party, expert-driven evaluation of your IT landscape with actionable, executive-ready outcomes.

Assessment of Current IT State

Deep dive into your technical infrastructure, internal/external IT team structure, and governance.

Detailed analysis of strengths, weaknesses, risks, and improvement areas.

Risk and Opportunity Analysis

Identify vulnerabilities, operational gaps, inefficiencies, and opportunities for cost savings or modernization.

Stakeholder-friendly overview with key insights and strategic recommendations.

Strategic Technical Roadmap

Define a scalable, secure, and efficient IT environment aligned with your business strategy.

Prioritized initiatives with estimated costs, timelines, and resource requirements for each key domain.

Costed roadmap showing one-time and recurring investment needs by infrastructure category.

Why Sourcepass?

With deep expertise across industries—from midmarket firms to healthcare and private institutions—our team understands the technologies and vendor ecosystems that drive real results. We bring best practices, objectivity, and technical insight to every engagement.



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Our Approach

We partner with leadership, IT teams, and key stakeholders to conduct collaborative interviews and review technical documentation—either onsite or remotely. Our structured methodology spans three core areas:

1. Organizational & Governance Assessment

- Assess internal IT team structure and vendor alignment
- Review governance, roles/responsibilities, and operational maturity
- Evaluate policies and procedures: AV/EDR, backups, DR, patching, monitoring, ticketing
- Review compliance readiness and cyber hygiene practices

2. Technical Infrastructure Review

- Examine network architecture, firewalls, internet/wireless, VOIP/call center infrastructure
- Review server/storage infrastructure, hypervisors, OS, and scalability
- Evaluate email, identity management (AD, MFA, SSO), collaboration tools
- Assess business application hosting, databases, remote access, and licensing
- Analyze endpoint systems, MDM, mobile devices, and end-user support models
- Review cloud usage, colocation, physical infrastructure, and facilities

3. Roadmap Development

- Define future-state IT architecture aligned with business needs
- Prioritize initiatives by impact, cost, and strategic fit
- Include one-time and ongoing investments by category



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Scope of Work

Infrastructure Organization

- Evaluate internal IT structure and external partnerships
- Identify gaps in roles, responsibilities, and effectiveness

Facilities & Infrastructure

- Assess physical IT infrastructure (server rooms, data closets, power, and security)
- Review colocation / cloud usage

Networks & Communications

- Analyze network architecture, firewall setup, internet connectivity, and wireless environments
- Review VOIP/call center infrastructure

Core Services

- Evaluate email, identity management (e.g., AD, MFA, SSO), and collaboration platforms
- Identify alignment with business objectives

Application Services

- Assess hosting of key business applications, remote access, data bases, and licensing
- Focus on backend infrastructure, not app workflows

End-User Services

- Evaluate endpoint devices, data handling, and mobile management
- Review MDM, pick-and-pack logistics, and support processes

Core Infrastructure

- Examine servers, storage, hypervisors, and operating systems
- Assess scalability and efficiency

IT Operations & Governance

- Review cyber hygiene: AV/EDR, backup, DR, patching, monitoring, and ticketing
- Evaluate policies, security practices, and compliance readiness



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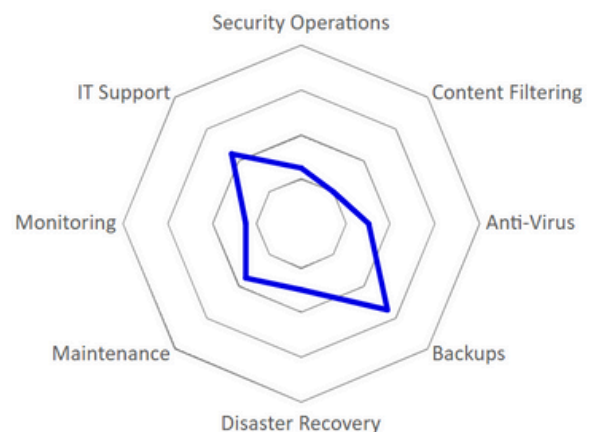
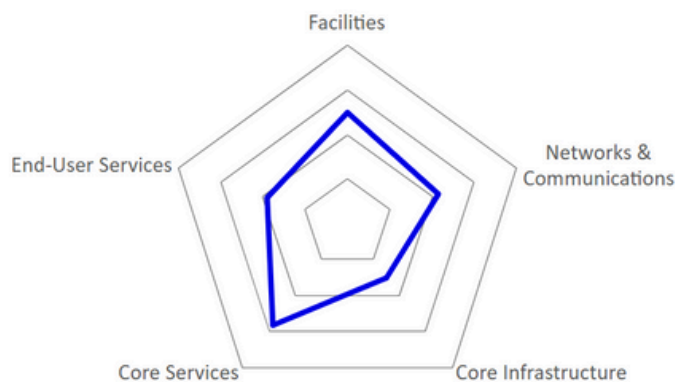
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Sample Report Elements

EXECUTIVE SUMMARY

Score	Observation	Key Recommendations
Infrastructure	B The infrastructure, while somewhat suitable, faces limitations due to the use of unconventional hardware, hindering automated management and support. The absence of a comprehensive IT asset inventory also challenges our ability to fully assess and optimize our IT landscape. Moreover, there are significant opportunities to enhance the IT security and redundancy of network & server infrastructure.	<ul style="list-style-type: none"> Resolve single points of failure on the network infrastructure layer and evaluate infrastructure hardware. Increase security on the firewall network and streamline network management. Transition server functions to cloud solutions and standardize device (servers & endpoints) procurement with major vendors for improved management and scalability.
IT Governance & IT Organization	D The business currently operates without a managed Endpoint Detection and Response (EDR) platform, leaving devices vulnerable to malware and lagging in timely updates. Partnering with an IT firm to implement a tailored EDR solution would markedly enhance the school's cybersecurity, ensuring a safer and more secure digital environment for all users. This shift would represent a significant advancement in the school's protective measures and operational resilience.	<ul style="list-style-type: none"> Partner with an outsourced IT firm to develop, implement, and maintain robust IT policies and procedures. Implement a managed Endpoint Detection and Response system (Anti-Virus). Remediate infrastructure management gap by integrating a Remote Monitoring & Management tool, for real-time reporting, inventory tracking, centralized control and automated patch management Transition day to day support to an MSP

RADAR MAPS



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Sample Report Elements

SCORECARD

Element	Score	Risk	Industry Comparison	Finding/ Observation	Comments/ Recommendations
Facilities	C	Low	Average		
Networks & Communications	C	High	Below Average		
Core Infrastructure	D	High	Below Average		
Core Services	C	Low	Average		
End-User Services	D	Medium	Below Average		
Operations & Governance	D	High	Below Average		
IT Infrastructure Support	D	Medium	Average		



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Sample Report Elements

OPPORTUNITIES FOR INVESTMENT SUMMARY

Workstream	Business Impact (\$'s in 000's)	Priority	One-Time Investments HW & SW		One-Time Investments 3rd Party Vendors		One-Time Investments Total		Annual Investments	
Technical Infrastructure & Governance Investments			Low	High	Low	High	Low	High	Low	High
Facilities	Notes	2	5	8	2	4	7	12	0	0
Network & Communications	Notes	2	50	60	30	35	80	95	15	20
Voice Services	Notes	3	5	7	10	15	15	22	30	35
Core Infrastructure	Notes	2	0	0	20	30	20	30	40	50
Core Services	Notes	2	0	0	40	45	40	45	5	7
Application Publishing	Notes	2	0	0	35	40	35	40	15	20
Application Selection Process	Notes	1	0	0	25	35	25	35	0	0
End-User Services	Notes	2	0	0	10	15	10	15	25	30
Security Operations	Notes	2	0	0	25	30	25	30	10	15
Operations & Governance	Notes	1	0	0	5	10	5	10	5	6
Technical Infrastructure Total			60	75	202	259	262	334	145	183
Priority 1 Subtotal			0	0	30	45	30	45	5	6
Priority 2 Subtotal			55	68	162	199	217	267	110	142
Priority 3 Subtotal			5	7	10	15	15	22	30	35

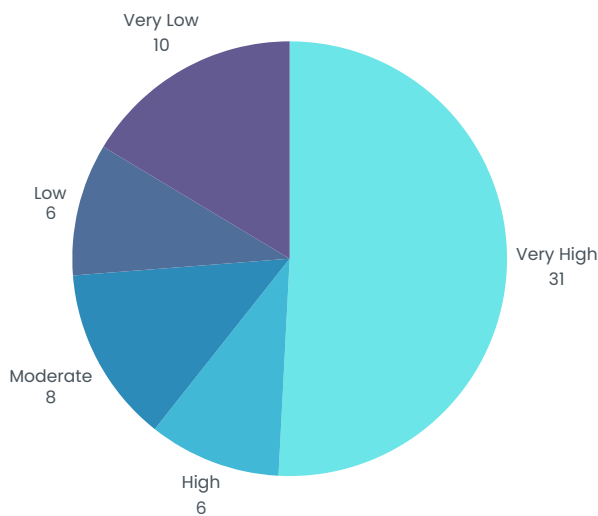


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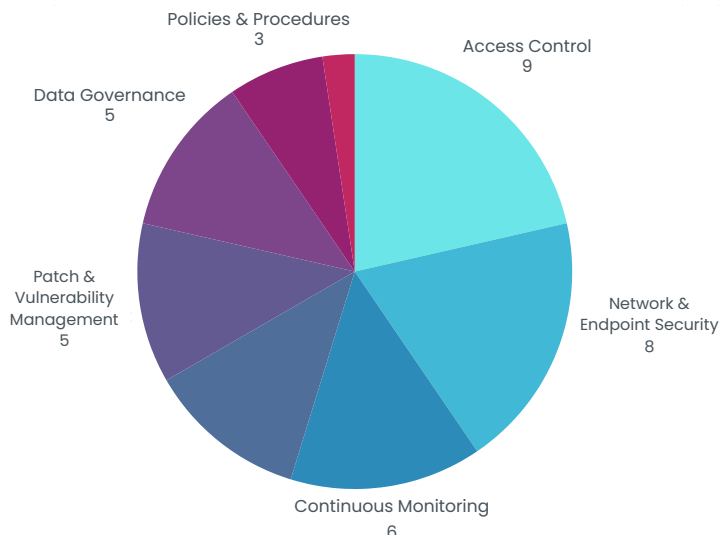
IT Infrastructure Assessment & Roadmap Report: Cybersecurity

Additional Workstream: Cybersecurity Assessment

Sample Report Elements

RISK BREAKDOWN**TOP THREAT EVENTS**

Vulnerability Category	Overall Risk
Living off the Land Attacks	Very High
Obtain Sensitive Information Via Exfiltration	Very High
Malicious Activity Using Unauthorized Ports, Protocols, and Services	Very High
Multistage Attacks	Very High
Accessing Information Stored on Publicly Accessible Systems	Very High
Ineffective Monitoring Due to Complexity of Infrastructure	Very High
Combined Attacks Across Presences	Very High
Manipulation of Files on Publicly Accessible Systems	Very High
Obfuscation of Actions	Very High
System Misconfiguration	Very High

TOP VULNERABILITY CATEGORIES**VULNERABILITY PREVALENCE**