

Technology Assessment Checklist for Small Businesses

A quick way to help your small-business customers get the best technology.

Today's small-business owners want reliable technology that helps them do their jobs quickly and effectively. But they also want to keep it simple. And that's where this checklist can help. It provides three simple steps to help you better understand the technology needs of your small-business customers.

How to use this checklist:

We encourage you to work one-on-one with your customers to complete the checklist. Alternately, your customers can complete step one on their own, and return the list to you to discuss steps two and three.

Three steps to the best technology:

1. The Assessment
2. The Dialogue
3. The Recommendation

Date: _____

Name: _____

Company: _____

Phone: _____

E-mail: _____

Step 1: The Assessment

Assess your current technology

BIG-PICTURE GOALS

1. From a technology standpoint, which business processes do you most want to improve?

2. What are your current technology concerns or challenges?

3. What technology devices or topics are you interested in discussing? (e.g., wireless networking, firewall protection, server improvements)

SOFTWARE

4. How many of your business PCs run the following operating systems? Number of PCs:

Microsoft® Windows® XP Professional	_____
Windows XP Home	_____
Windows 2000	_____
Windows ME	_____
Windows 98	_____
Other	_____

5. Which of these productivity applications are running on your business PCs?

- Microsoft Office Suite
 Word
 Excel®
 PowerPoint®
 Project
 Access
 Web Mail
 Outlook®
 Outlook Express
 Eudora
 Other _____

6. Please provide the names or lines of business applications running on your business PCs (software specific to your industry or business, including accounting software):

7. Which operating systems are installed on your server/s?

- | | |
|---|---|
| <input type="checkbox"/> Windows Small Business Server 2003 (Premium or Standard) | <input type="checkbox"/> Windows NT® Server |
| <input type="checkbox"/> Microsoft Small Business Server 2000 | <input type="checkbox"/> Novell Network |
| <input type="checkbox"/> Small Business Server 4.0 or 4.5 | <input type="checkbox"/> Linux |
| <input type="checkbox"/> Windows Server™ 2003 (Standard or Enterprise) | <input type="checkbox"/> Unix |
| <input type="checkbox"/> Windows 95 | <input type="checkbox"/> Other _____ |
| <input type="checkbox"/> Windows 98 | |

Step 1 (continued)

HARDWARE

8. Please provide the RAM and CPU speed of your PCs, laptops, and servers:

RAM speed:

CPU speed:

PCs/Laptops:		
Servers:		
Servers:		
Servers:		

Note: To determine RAM speed, CPU speed, and operating system, simply right click on the My Computer icon on your desktop and left click on Properties. Finding this information is not the same on every PC operating system, so if you need assistance with this, call your IT consultant.

9. Does your business technology include any of the following peripherals?

- | | | |
|--|---|---|
| <input type="checkbox"/> Color laser printer | <input type="checkbox"/> Fax | <input type="checkbox"/> Digital camera |
| <input type="checkbox"/> Laser printer | <input type="checkbox"/> Black-and-white copier | <input type="checkbox"/> Smartphone |
| <input type="checkbox"/> Ink-jet printer | <input type="checkbox"/> PDA | <input type="checkbox"/> MP3 player |
| <input type="checkbox"/> Other printer | <input type="checkbox"/> Scanner | |

10. What brand/type of server hardware (if any) are you running? _____

NETWORK/CONNECTIVITY

11. Please provide the name of your Internet service provider (ISP): _____ Type: DSL Cable Dial-up Satellite

12. Do you have a network?

- Yes, peer-to-peer (e.g., PCs connected to each other without a server) Yes, server-based network No Don't know

13. Can you access your network remotely?

- Yes No

STORAGE & BACKUP

14. Does your hard drive have sufficient data storage capacity?

- Yes No

15. Do you have a secondary data back-up method? (i.e., DVD or CD burner)

- Yes _____

Thanks for completing the assessment! Now, let's talk...

Step 2: The Dialogue

Discussing the needs of your business

A conversation with your IT consultant—and asking the right questions—can help save you a lot of money. This dialogue also ensures that you're getting the most out of your technology and service agreements.

Don't forget to ask about simple ways to help maintain your technology investment. A few minutes of maintenance each month can go a long way toward securing your PC and helping to prevent Internet virus infections, data loss, and slow performance.

1. Discuss whether your system should include:

- The most current operating system
- Compatibility with the latest hardware, software, and other devices
- Preinstalled applications (such as Microsoft Office)
- Genuine licensed software with the certificate of authenticity
- Network security
- Ability to access files on a network share, even when it is not connected to the server
- Internet firewall
- Security from internal threats with file encryption and access controls
- Identity-theft protection
- Virus protection
- AntiSpyware
- Spam filters
- Pop-up ad filters
- Automated updates
- Support from the manufacturer

Tip: Did you know that preinstalling most software applications and operating systems on a new PC is less expensive—and more convenient—than purchasing them separately at a later date?

2. Discuss whether your PC should include:

- DVD burner
- DVD player
- CD burner
- Ethernet gigabit for high-speed Internet access
- High-speed wireless card
- Bluetooth® technology
- Wireless keyboard
- Wireless mouse
- 3D graphics card
- Sound card
- Flat-panel monitor

3. Discuss maintenance and technical support programs:

Typical response time and hours of support:

Additional topics for discussion:

- Connecting remote users securely
- Safeguarding your wireless network
- Controlling in-house access with passwords
- Performing regular maintenance on the hard drive
- Deleting temporary files from the hard drive
- Cleaning up the Internet browser cache
- Checking for spyware/adware
- Ensuring firewall software is updated
- Ensuring your PC is set up to receive automatic software updates via the Internet
- Ensuring your PC has automatic updates for the virus software

Ask about our:

- Service agreements
- Maintenance contracts
- Technical support

Step 2 (continued)

TOP 10 BENEFITS OF WINDOWS XP

1. Experience Less Downtime with a System

That Stays Up and Running

Demand more from your PC. Windows XP Professional is the most reliable Windows operating system yet—at least ten times more reliable than Windows 98 SE*—with improved system recovery tools and advanced security technologies to keep your PC running smoothly.

2. Share Computers and Network Resources

Easily share documents, valuable resources, and devices such as faxes, printers, and even an Internet connection with a small office network. Connect multiple computers to the Internet through your Windows XP Professional PC and a single Internet connection for potential savings in Internet Service Provider fees and hardware costs. Fast user switching makes sharing a computer with your coworkers easier.

3. Protect Your Important Business Documents and Information

The Encrypting File System provides a high level of file protection from hackers and data theft by transparently encrypting selected files with a randomly generated key. If your laptop gets stolen or lost, unauthorized users should not be able to read or view the encrypted files.

4. Streamline Your Security Settings

Windows Security Center provides a single, unified view of key settings and tools so that you can easily monitor your PC's security settings in one convenient place.

5. Integrate Your Solutions

Easily integrate Windows XP Professional desktops and notebooks into Microsoft Windows Server environments, including a Windows Server-based domain.

6. Block the Pop-Ups

The Internet Explorer Pop-Up Blocker included in Windows XP Professional makes browsing the Internet easier by helping reduce the number of unwanted ads and content.

7. Get Firewall Protection from Startup to Shutdown

The powerful, built-in Windows Firewall with startup and shutdown support offers additional protection against viruses and hackers by extending Windows Firewall protection from the moment you turn your PC on to the moment you turn it off.

8. Reverse Harmful System Changes

Recovery tools in Windows XP Professional provide a safety net to keep your business PCs running. With System Restore and Device Driver Rollback, you can undo harmful changes quickly and easily. For example, if you install hardware drivers or software applications and then discover a problem resulting from the change, you can easily reverse and “undo” the change, thereby returning your PC to its previous working state.

9. Work from Anywhere

Easily configure wireless networks for the office, or connect seamlessly to wireless “hot spots” without having to install or update third-party software. The Remote Desktop feature in Windows XP Professional allows you to connect and use your desktop computer remotely from another computer running Windows 95 or later, giving you access to all of your data and applications as if you were sitting right there.

10. Protect Your PC from Harmful Attachments

By isolating potentially unsafe attachments, the Attachment Manager in Windows XP Professional helps to safeguard your computer from viruses that can spread through Internet Explorer, Outlook Express, and Windows Messenger.

*Based on results from eTesting Labs Windows XP Reliability Study 2001.

Step 3: The Recommendation

Be sure your software is genuine

Genuine Microsoft software provides more reliable and more secure solutions for your small business. It also provides the latest downloads, tools, and content to help you and your employees maximize productivity. And with genuine Windows software, you can take advantage of valuable offers such as a free download of Microsoft AntiSpyware.

Top three reasons to consider genuine Microsoft software:

1. Greater Reliability
2. Faster Access to Updates
3. Overall Richer Experience

Based on the information you have provided, your IT consultant recommends:

Hardware

Desktop PCs:

Laptops:

Tablet PCs:

Servers:

Software	Other	Maintenance/Support

Tip: If you are currently running Windows XP, verify that it is genuine by visiting www.microsoft.com/smallbusiness/genuine.

For additional information and resources, please visit the following:

Windows Genuine Software—<http://www.microsoft.com/genuine>

Windows XP—<http://www.microsoft.com/windowsxp>

Windows Security—<http://www.microsoft.com/security>

Small Business Center—<http://www.microsoft.com/smallbusiness>



Key Terms to Know When Buying a PC

Ever been confused by the long list of technical specifications that you read in an advertisement for computers or software? You're not alone. The good news is, there are really just a few terms you need to know to understand if what's in the ad is what's right for your business.

SOFTWARE

Firewall—A dedicated computer or device that—for security purposes—filters unwanted data. Firewalls are often used to provide secure access to the Internet as well as to separate a company's public Web server from its internal network.

Operating System (OS)—The software that controls the allocation and usage of hardware resources such as memory, central processing unit (CPU) time, and other devices.

Pop-ups—A form of online advertising in which a small window appears above the browser window and interrupts the user's page-view.

Pop-up Blocker—A software application that works in conjunction with an Internet browser to automatically disable pop-up windows.

Spyware—Unauthorized software that can track Web surfing habits without the user's knowledge.

HARDWARE

CD-R Drive—Short for compact disc recordable drive, it can create—or "burn"—CD-ROMs and audio CDs.

Central Processing Unit (CPU)—The CPU, or processor, interprets data into computer language. For example, if you see a picture of a canyon on your screen, the computer processes millions of number strings and translates them into the image. The faster your processor speed, the faster it processes your data. An average speed is 2.5 gigahertz (GHZ).

DVD Drive—The device used to read DVDs. A DVD is an optical disc storage media format with excellent video and sound quality used to play movies.

DVD-R Drive—A device that reads, erases, or "burns" DVDs.

Flat Panel Display—A thin display screen—designed to minimize reflections—often used with laptop computers.

Graphics Card (Video Card)—Functioning much like a mini-computer inside your PC, this processor translates graphics into motion for multimedia games and videos. The more RAM you have on your graphics card (separate from the RAM in your PC), the smoother your graphics and videos will run. A graphics card averages 128 megabytes (MB) of RAM.

Hard Disk (Drive)—The primary source of storage for your PC. Any files saved on your hard disk (HD) remain safely stored. An average hard disk size is about 150 gigabytes (GB)—roughly enough storage space for 36 full-length movies.

RAM (Random Access Memory)—A group of memory chips that functions as the computer's main workspace. The more RAM your computer has, the faster it will run.

Tablet—An input device that employs a stylus, electronic pen, or specialized mouse to write or draw on the tablet surface. The data can then be transferred into the computer.

Tablet PC—A computer designed to function like a portable writing tablet. It includes handwriting recognition and has the ability to store data as graphics rather than text.

Universal Serial Bus (USB)—A hardware interface for attaching peripheral devices. Capable of connecting a large number of external devices on a computer, USB is typically used for low-speed components such as mice, keyboards, and modems.

Key Terms to Know When Buying a PC (continued)

NETWORK & CONNECTIVITY

Bluetooth—A low-speed wireless technology that allows for short-range digital voice and data transmission. Commonly used in cellular phones (to transfer images and music), wireless keyboards, and wireless mouse devices.

Broadband Connection—A term synonymous with high-speed Internet.

Cable Modem (High Speed)—A modem that transmits data to and from the Internet via a television cable connection. Typically offered by a local cable television company.

DSL (High Speed)—An “always-on” technology that greatly increases the capacity of a standard telephone line to transmit data to and from the Internet. Typically offered by a local telephone company.

Ethernet—A widely used local area network (LAN) access method.

FireWire—A high-speed data transfer technology used mostly in digital video or external hard drives.

LAN (Local Area Network)—A communications network that serves users within a confined geographic region.

Modem (Low Speed)—A device that transmits data to and from the Internet via a standard telephone line.

Satellite Modem—In remote locations, where DSL and cable modems are unavailable, this device transmits and receives signals from a satellite transponder.

Webmail—An interface that allows users to read and write e-mail using a Web browser.

Wireless Network—A type of local-area network that uses high-frequency radio waves rather than wires. This technology allows two or more computers to be linked wirelessly.

Wireless Network Card—Standard on laptop PCs, it connects to the Internet wirelessly.

STORAGE

CD—Typically stores 0.75 gigabytes of data. This is equivalent to approximately 75 minutes of audio.

DVD—Typically stores 4.2 gigabytes of data. This is equivalent to approximately one movie, or about 420 minutes of audio.

FireWire Drive—Similar to a USB pen drive, this external disk drive is plugged into a FireWire port.

Hard Drive—Capable of storing large amounts of data (150 gigabytes or more).

USB Pen Drive—Accessed through the USB port, this small, portable device stores computer files.

Megabytes (MB)/Gigabytes (GB)—Units of computer memory or disk storage space equal to 1,048,576 bytes or 1,024 megabytes.

Megahertz (MHz)/Gigahertz (GHz)—A measure of the speed at which information is processed equal to one million or one billion hertz.