



TECHNOLOGY SELF ASSESSMENT

Digital Innovation Group

Technology Self-Assessment

The intention of this document is to provide an outline for an individual or organization to look holistically at their technology footprint. To think through the benefits and challenges of their current use of digital tools, as well as the people practices associated with this space.

Part 1: Application Inventory – In this section you will want to look at the various applications being used by your organization. Whether they are applications installed on your local computer, or web-based services and tools used for business purpose. We have divided these applications into a couple different categories:

- **Web Presence & Social Tools:** These are the digital tools used for engaging your external audience. Things like your website, Social media, or Video streaming platforms that you may use. Examples: Facebook, Instagram, Hootsuite, Domain Name Services, YouTube, or WordPress.
- **Communication & Collaboration:** These are the applications you use to communicate and to facilitate working together. Things like your email platform, File Sharing services, video conferencing, and instant messaging tools. Examples: Gmail, Microsoft Teams, Zoom, Google Drive, and DropBox.
- **eCommerce, Retail, POS, and Inventory Management:** Any applications utilized in the sale of goods or services for your organization. Examples: Square, PayPal, Shopify, or WooCommerce,
- **Operations & General Administration:** Software or technologies used in the standard operation and administration of running your day-to-day activities. Examples: Canva, Microsoft 365, Microsoft Office, Google Workspace
- **Finance & Accounting:** Technologies used in the management of finance and financial practices. Examples: Square, Quickbooks, or Sage.
- **HR, Staffing, and People Management:** Technologies used in the management of your staff, and volunteers. Whether for payroll, time management, and or recruiting. Examples: Monster, Quickbooks Payroll, ADP, or Clockify.

Now for the activity part of the program.

1. On a piece of paper or a spreadsheet, please list each of the applications or technology services that you use. Odds are pretty good that the first two categories will be the longest lists, as they tend to be most diverse spaces with the largest number of tools or platforms. The final two categories may have the shortest lists, as these tend to be areas of defined line of business solutions that meet most of the requirements of the space.
2. Next, for each item on your list we will want to define the following:
 - What purpose does this technology serve for your organization. What challenges does it help you to overcome?
 - Does this solution meet your needs, and does it fulfill your expectations?
 - How many accounts do you have for this system?
 - i. How many of your people are administering this system?
 - ii. Are accounts setup by individual name or role? (Is this standard across all systems?)
 - iii. Are you sharing passwords, or does each user have their own?
 - Is this application installed on your machine? Or is it a Web based application you subscribe to?
 - What are the licensing costs associated with this application or service? One time payment, annually, or monthly?
 - Does this app or service hold information vital or beneficial to your business?
 - i. Do you export or backup this information in any way?
 - ii. If so, at what frequency?
 - Does your organization have defined roles and responsibilities associated with this application or service?
 - i. Who does what?
 - ii. How much of their time is allocated to this activity on a daily/weekly/monthly basis?

Part 2: Now we are done with the spreadsheet and on to the general Q&A. Some of these questions will refer to the Application Inventory outlined above, though many are peripheral and should be thought of in relation to both your organization and the impacts on any associated technologies.

Role, Responsibilities, and Business Processes – Here we will look at your people and business processes.

- Do you have clearly defined job descriptions, including roles and responsibilities, for all members of your organization?
- Is your staff aware of these descriptions and what is expected of them?
- Have you defined the processes within your organization and what function each role performs in this process? (the who does what, and at which part of the process, and where the boundaries are with others)
- Do your role definitions align to your digital toolset outlined above in your application list?
- In this area, overall, how do you feel your organization is doing?
- Do you have any specific pain points or challenges?
- What do you feel you should focus on first?

Security Awareness – As technology becomes an increasing part of our everyday operations, cybersecurity awareness and practices are relevant to all aspects of what we do.

- Is cyber security a point of concern for you?
- If you said 'yes' to sharing passwords in the section above. What do you do when an individual leaves the organization? Do you reset shared passwords?
- Do you have a standard password reset or change schedule?
 - If so, at what frequency?
- Do you have or use any password management tools or software?
- As an organization, do you close old accounts? Or cancel dormant software subscriptions?
 - If not, do you monitor these spaces for activity?

Enterprise Content Management – How we manage, maintain, and share information, informs how effective we can be in our daily operations.

- Do you feel the members of your organization can find relevant information without needing to ask someone where it is?
- Do you have a file management structure in place?
 - If so, does everyone understand, use, and adhere to the structure?
- Do you have a file naming convention in place?
- Do you have any retention schedules, or records classifications in place?

Hardware

- Do your employees use computers and devices issued by your organization? Or do they use their own?
 - If their own, do you have Antivirus / threat protection requirements for their devices?
- Is there a device standard or version standard presently in place? (Windows vs Mac; iOS vs Android, etc.)
- Are there password protocols required for these devices? Do all devices require password sign on?

Information Integrity

- Do you feel you have a single place that you can get an accurate count of your stakeholders? Whether it be Members, Artists, Patrons, or Customers?
- Is this information held in a single system? If so, which application is that?
- Are you able to easily calculate the financial benefit of these stakeholders? Or of your organization to these Stakeholders? If so, how?
- Do you have someone in your organization responsible for ensuring the integrity of your data?
 - If not, is this a concern for you?
 - Do you feel that technology will solve this problem for you?

Well, there you go. You made it all the way through. Next step is to put this document aside and come back to it in a few days' time. Maybe on a Thursday morning, with a cup of coffee, when you are feeling a little philosophical. Review your answers and see if they still hold true, and if so, how that impacts your people and your organization. Are there things you can do to lighten the load or add some clarity to the people whose every day is impacted by the applications or answers listed above. If you have a long list of digital tools being used, do you need them all? If there are some applications that are not bringing value to your operation, can you remove them. If there are application or process challenges you are experiencing, you are probably not the first, nor the last to do so. Do you have another arts organization you can reach out to? Maybe, they have already addressed a common challenge, or are ready to 'thought partner' with someone to find an answer.