

IT Operations Plan

A. Current Environment Analysis

SaaS Operation:

Hybrid co-location sites with Equinix Systems, 7 global office locations, 15 years old. 3K+ customers, small to large 70/20/5%, bills for monthly number of users per subscription. Professional services offered for user account maintenance and data migration is 38% gross revenue per year.

Hardware:

TreasureChest owns all hardware. They have wiring closets in 4 offices.

Operating Systems:

Company is likely running Windows Server 2003, Windows XP Professional x64 Edition and Linux Ubuntu.

Networks:

Monitored by OnOne Ltd and the company itself, limited monitoring hours currently.

Software:

Treasury application developed in 2007, developed in Java and Python communication protocols, Agile and Waterfall development methods being used by different regions.

Applications are developed and hosted in 4 locations.

There are adoptions of non-sanctioned software in specific regions or teams.

Database:

Company likely running multiple instances of database such as EnterpriseDB.

B. Strategic Goal:

Strategic Goal: Update the technology operational workflow.

IT Operations Goals

- 1) Establish baseline standards for hardware throughout the company
- 2) Setup centralized NOC/SOC for network and security monitoring
- 3) Implement scheduling of current IT staff to support 24/7 monitoring for all locations.

C. Strategic Goal

Strategic Goal: Improve and upgrade the business system software

IT Operations Goals

- 1) Integrate Sage ERP with Sage CRM
- 2) Implement MS Office 365 with Exchange for email
- 3) Implement MS Teams for instant messaging and team collaboration

D. Strategic Goal 1

IT Operational Goal	Enhancements needed to support the strategic objective	Planned activities to meet each objective
Goal 1: Establish baseline systems configs	Document current systems and configuration	Chart configuration of current systems and decide needed configurations vs those not in compliance.
Goal 2: Set-up centralized NOC/SOC for network and security monitoring	Analyze current network posture to determine baseline compliance objectives	Configure logging for real time analysis
Goal 3: Implement inhouse monitoring NOC and SOC 24/7 schedules	Schedule FTE in 8-hour shifts, three per day including weekends.	Create a shift lottery for employee preference.

D. Strategic Goal 2

IT Operational Goal	Enhancements needed to support the strategic objective	Planned activities to meet each objective
Goal 1: Implement Sage ERP with Sage CRM	Standardize data types and structures to tables for import into ERP and CRM systems	Backup current data from multiple sources for ERP and CRM

Goal 2: Implement MS Office 365 with Exchange for email	Standardize user account and email within Azure	Deploy MS Azure
Goal 3: Implement MS Teams for instant messaging and team collaboration	Supply training for the use of Teams Instant Messaging internally and Team Collaboration	Company communication of acceptable use policy

E. Sustainability Plan	
One Year	<p>Decide business needs and requirements, set up measurable metrics and key indicators, Define ITIL roles, get owners trained in ITIL framework.</p> <p>Create configuration management baselines</p> <p>Document current SAAS service portfolio and supporting services</p> <p>Establish centralized network and security operations center for 24/7 monitoring and incident management</p> <p>Establish incident management tracking processes for escalation and review of problem and change management.</p> <p>Identify related COBIT framework roles for the company to plan to implement.</p> <p>Record and analyze key indicators for improvement opportunities</p> <p>Benchmark progress against ISO/IEC 20000 standards and adjust long term targets to align with results</p>
Three Year	<p>Analyze annual key indicators improvement opportunities in each of the sustainability year one objectives and measure effectiveness</p> <p>Project Management Office to continue regular updates for stakeholders to understand progress; communicate requirements to address lessons learned to stakeholders</p> <p>Continue to watch all projects to ensure success of expected outcomes</p> <p>Perform gap analysis and benchmark progress against ISO/IEC 20000 standards and consider external resources to help keep alignment with long term target results if needed, adjust long term targets to align with results.</p>
Five Year	<p>Analyze annual key indicators improvement opportunities in each of the sustainability year one and year three objectives and measure effectiveness</p> <p>Perform gap analysis to determine if goals are met</p> <p>Stakeholder satisfaction reviews, share success stories and lessons learned</p> <p>Integrate lessons learned for next iteration of the cycle</p> <p>Identify new opportunists for improvement</p>

F.	
Enhancement	Security Risk and Plan to Address Risk
Centralized NOC and SOC Implementation Schedule FTE in 8-hour shifts, three per day including weekends.	Employees may push back against schedule changes. Implement a schedule lottery and allow employees to offer feedback on the criteria to use. This will provide the opportunity for employees to buy in by taking part in the process, consensus on fair terms and pre-amble to adjust. Maintain staffing agency network to staff the NOC/SOC during implementation.
Centralized NOC and SOC implementation	The potential for high volume incident reporting during implementation is a risk. Training and review prior to implementation will help mitigate the number of incidents reported, setting up a knowledge base for users to review before sending an incident to vet the issue and that it is not able to be resolved by the user and communicating clear lines of escalation of incidents will help to minimize this as users interact with and increase familiarity with systems.
Implement baseline systems configs Document current systems and configuration	Identifying systems that are not in compliance with newly established configuration baselines will be a challenge, we will need to decide how to bring these into compliance, we do a system exchange with users instead of retiring non-compliant systems to limit the amount of interruption associated with getting the systems into baseline configuration compliance
Standardize data types and structures to tables for import into ERP and CRM systems	Stale and inaccurate data will be a risk, we will need to scrub data on export and on import to ensure its accuracy and integrity.
Provide training for the use of Teams Instant Messaging internally and Team Collaboration	Training will need to be targeted, role-based training to ensure the right groups have access to necessary infrastructure and resources. We will need to set up guidelines for MS Teams collaboration to be proper, effective and productive to avoid the risk of Teams collaborations being mis-used by employees.
Standardize user account and email within Azure	Azure licensing cost can grow exponentially, we will have to work hand in glove with Microsoft to understand how adding a new user, user account, domain, will impact the bottom line. Gathering this information as part of implementation planning to be used as an aid when structuring the Azure portal, the domain and user accounts will provide us the cost to plan and budget for growth.

G. Operational Workflow



