



SOURCEPASS™

Strategic IT Planning Playbook

*A step-by-step guide to aligning
technology with business goals*

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Navigating the Path to RARE Technology Success with MAPS

It's truly **RARE** for employees to have everything they need from technology to feel fully productive, supported, and empowered. That's not just a tagline—it's the reality in most organizations today.



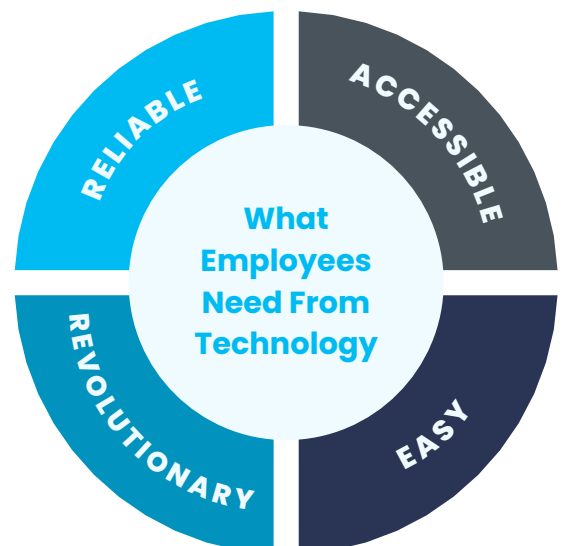
[Check Out
Matt's Full Talk](#)

As Sourcepass Chief Client Officer Matt McCarthy shared in a recent conversation:

"If you're in IT or leadership, you're probably tracking CSAT—customer satisfaction—and maybe even ESAT—employee satisfaction. But what gets missed is how those two are deeply connected. You can't have great customer experience without enabling your employees to do their jobs well. And that all comes back to whether the technology works the way it should."

That's what RARE is all about:

- Reliable systems that don't crash or slow teams down
- Accessible tools that work from anywhere, on any device
- Revolutionary thinking that brings innovation to everyday workflows
- Easy experiences that reduce friction and frustration



Navigating the Path to RARE Technology Success with MAPS

When employees have RARE technology experiences, customer satisfaction goes up, employee retention improves, and the business performs better overall. But getting to RARE doesn't happen by accident—it requires a thoughtful, structured approach.

This is where MAPS comes in.

Like any journey worth taking, reaching a destination like RARE requires planning, coordination, and visibility. Our MAPS framework helps businesses do just that, guiding organizations to:

- Mitigate Risk across infrastructure, cybersecurity, and compliance
- Align with Business Goals to ensure IT supports what matters most
- Leverage predictability in both operations and budgeting, so IT isn't a wildcard
- Sustain Operations through scalable systems and continuous improvement

MAPS is the method. RARE is the result.

This playbook shows you how to use scorecards, assessments, and collaborative roadmapping to connect technology performance with real business outcomes—driving satisfaction across every level of your organization.

Let's begin.

The Link Between Technology, People, and Performance

At Sourcepass, we've seen this time and again: when technology doesn't work the way it should, it doesn't just cause minor inconvenience—it creates friction across the entire organization. Systems that lag, tools that don't integrate, or processes that force workarounds all chip away at productivity and morale.



[Check Out
Matt's Full Talk](#)

As Matt McCarthy Explained During His RARE + MAPS Training Session:

"You can't have a great customer experience if your employees don't have the tools to succeed. ESAT and CSAT are connected—when tech fails your team, it's not just frustrating, it blocks them from doing their jobs well. That frustration shows up in how they serve clients, how engaged they are, and ultimately how successful the business is."

This is the core insight that shaped the RARE framework and drives our planning approach with **four simple truths**:

- If technology fails, employees struggle
- When employees struggle, employee satisfaction (ESAT) declines
- Lower ESAT leads to lower customer satisfaction (CSAT)
- Lower CSAT score means missed goals, poor retention, and weaker organizational performance

The Link Between Technology, People, and Performance

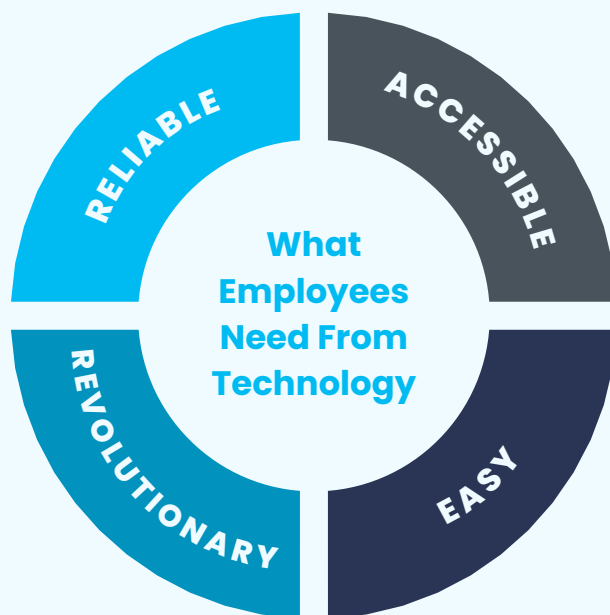
It's a straight line from technology to employee experience, to customer outcomes, to business success. That's why IT can no longer be treated as a background function—it must be strategic, proactive, and people-centered.

The MAPS framework turns that insight into action. It gives leaders a clear method to plan, prioritize, and invest in technology in a way that supports every layer of the organization—from the frontline employee to the end client.

Through MAPS, we help you create a technology environment where employees are set up for success, and that success flows directly into measurable outcomes for your business.

RARE isn't just a feel-good concept.

It's the standard your people deserve, and MAPS is how you make it real.



The Sourcepass Approach

At Sourcepass, we don't just provide technology solutions; we deliver a partnership rooted in excellent service, strategic guidance, and innovation. Our approach is designed to make IT planning clear, manageable, and aligned with your business and employee needs.

How We Bring MAPS and RARE to Life:

Comprehensive IT Scorecards:

We start with a fast, informal assessment of your current IT landscape and employee experience—benchmarking reliability, accessibility, innovation, and ease against risks and business goals. This gives a clear baseline and uncovers hidden gaps.

Collaborative Roadmap Workshops:

We work closely with your leadership and stakeholders to prioritize initiatives, balance short-term needs with long-term vision, and create a practical timeline that minimizes disruption and maximizes value.

Ongoing Strategic Oversight:

Through our Virtual CIO (VCIO) services and our [Quest®](#) platform, we maintain real-time visibility into IT health, project status, and emerging risks—keeping your technology predictable and aligned with evolving business objectives.

Innovative Service Delivery:

Leveraging automation, AI-driven insights, and proactive management, we reduce manual effort and improve response times—so your team can focus on strategic initiatives rather than firefighting.

Our mission is to empower your organization to navigate technology complexities with confidence, creating a workplace where employees have the RARE combination of tools and support they need to excel.

PHASE 1: DISCOVERY

Scorecard & Baseline Assessment

- ✦ **Objective:** To establish a clear, shared understanding of your organization's current IT posture, risk profile, and alignment with your business' goals.

Before you can plan for the future, it's crucial to have a full understanding of where your organization stands today.

Phase 1 of the Sourcepass Technology Planning Playbook is designed to quickly and effectively uncover critical insights about your IT environment—without disrupting your day-to-day operations.

What's Delivered in This Phase?

Pre-Engagement Scorecard

A high-level, fast-turnaround diagnostic tool completed by our Solution Consultant team.

The Pre-Engagement Scorecard assesses core areas of your IT environment and provides immediate visibility into potential gaps, risks, and opportunities for improvement.

It includes a visual summary and actionable insights across five key dimensions:

Key Outcome:

You'll receive a visual heatmap highlighting areas of strength and concern, along with a short summary of initial findings. This gives you and your leadership team a shared foundation to discuss what's next—before any formal engagement begins.

- **Security Posture:** Are your systems, data, and users protected?
- **Infrastructure Health:** Are your networks, servers, and cloud services stable, scalable, and up to date?
- **End-User Experience:** Are employees productive—or are they frustrated by slow, unreliable tools?
- **Business Alignment:** Is IT supporting your business strategy or slowing you down?
- **Pain Points & Priorities:** What's not working? What's keeping your teams up at night?

➤ PHASE 1: DISCOVERY

Scorecard & Baseline Assessment

Our Approach: Designed for Impact & Efficiency

The Scorecard is structured to resonate with both technical and non-technical decision-makers. Whether you're a CFO, COO, IT manager, or department lead, you'll walk away with clarity.

We believe in proving value early. The Scorecard is offered as a complimentary resource, and many clients use it to jump-start internal discussions—even before choosing Sourcepass.

- Fast, Informal, but Insightful
- No Cost. No Obligation.
- Built for All Stakeholders
- We deliver value in days (not weeks)
- Insight without requiring deep technical discovery or long meetings

Why Does this Matter?

Many organizations struggle with invisible IT gaps—issues that drain productivity, increase risk, or slow growth. Without a structured discovery process, those issues persist.

This phase turns the unknown into the actionable. It helps you:

- Start strategic IT planning with data, not guesswork
- Build internal consensus around key challenges
- Prepare for a roadmap that aligns with what you truly need

What's
Next?



A comprehensive, strategic analysis designed to give your organization a clear-eyed view of your IT operations, infrastructure, and governance.

PHASE 2: ASSESS

In-Depth Evaluation & Gap Analysis



Objective: Establish a clear, objective baseline of your current IT environment to identify risks, gaps, and opportunities—while laying the foundation for a scalable, secure, and business-aligned technology strategy.

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

The **Sourcepass IT Infrastructure Assessment & Roadmap** is a comprehensive, strategic engagement designed to give your organization a clear-eyed view of your IT operations, infrastructure, and governance. We uncover what's working, what's not, and what's next—so you can reduce risk, boost performance, and plan for long-term success with confidence.

You'll gain an executive-ready understanding of how your current IT stack supports—or hinders—your strategic goals. We provide a tactical, future-ready roadmap to modernize, secure, and streamline your IT operations.

What's Delivered?

Your engagement will include a third-party, expert-driven evaluation of your IT landscape with practical, actionable insights.

Current State Assessment

- In-depth review of technical infrastructure and IT team/vendor structure
- Identification of key strengths, weaknesses, risks, and inefficiencies
- Evaluation of IT operations maturity and governance practices

Risk & Opportunity Analysis

- Highlights vulnerabilities, compliance gaps, and modernization opportunities
- Provides cost-savings insights and optimization recommendations
- Stakeholder-friendly documentation with strategic direction

Strategic Roadmap

- Future-state IT architecture aligned to business priorities
- Prioritized initiatives with estimated costs, timelines, and effort levels
- A costed roadmap outlining OpEx and CapEx investments across IT domains

In-Depth Evaluation & Gap Analysis

What We Assess

Our collaborative process combines onsite or virtual discovery, documentation review, and leadership interviews. This ensures we deliver both technical insight and business relevance.

We Assess Across 3 Core Dimensions

1. Organizational & Governance Assessment

- Analyze internal IT structure, staffing, and external vendor alignment
- Review governance roles, responsibilities, and operational maturity
- Evaluate security policies, compliance posture, and hygiene practices (e.g., AV/EDR, backups, DR, patching, monitoring, ticketing)

2. Technical Infrastructure Review

- **Network:** Architecture, firewall setup, wireless, internet, VOIP/call center
- **Core:** Servers, storage, hypervisors, OS, scalability
- **Cloud/Facilities:** Usage of colocation/cloud, physical IT infrastructure
- **Identity & Collaboration:** Email, AD, MFA, SSO, Microsoft 365, etc.
- **Application Hosting:** Databases, remote access, licensing
- **End-User Environment:** Endpoint devices, MDM, mobile logistics, support models

3. Roadmap Development

- Define future-state environment with aligned architecture
- Score and prioritize initiatives by impact, urgency, and budget
- Provide phased implementation recommendations with estimated investment

4. Innovation Readiness

Modern organizations need more than stability—they need agility. Our team evaluates your environment's potential for innovation in areas such as:

- **Workflow automation**
- **Artificial intelligence and analytics**
- **Cloud modernization and platform consolidation**
- **Data integration and cross-functional visibility**

We help you identify where tech can be a growth driver—not just a utility.

In-Depth Evaluation & Gap Analysis

Scope of Work Highlights

Domain	Key Focus Areas
Infrastructure Organization	Internal team structure, vendor roles, governance
Facilities	Server rooms, power, cloud/colo usage
Networks & Communications	Network design, firewall, wireless, VOIP
Core Infrastructure	Servers, storage, scalability
Core Services	Email, identity, collaboration
Application Services	Hosting, access, licensing
End-User Services	Endpoints, MDM, support logistics
IT Operations & Governance	Security practices, compliance, IT hygiene

PHASE 2: ASSESS

In-Depth Evaluation & Gap Analysis

Our Approach

This assessment is more than a checklist—it's your strategic launchpad. With Sourcepass, you move from uncertainty to clarity, and from complexity to control.



Depth & Rigor

Comprehensive review of every domain from infrastructure to governance



Business Context

Designed to support decision-makers, not just technicians



Tailored Roadmaps

Practical, costed plans that align with your unique goals



Proven Methodology

Trusted by hundreds of midmarket and regulated businesses



Human-Led & Data-Informed

Our virtual CIOs, technical consultants, and client strategists work as one team. This combination ensures that every insight is both technically sound and business-relevant.



Balanced Evaluation

We don't just look at systems—we evaluate risk, workflows, employee needs, and business strategy. This 360° approach delivers a roadmap grounded in reality, not theory.



Strategic Output

You'll Receive:

- An Executive Summary,
- A detailed Assessment Report
- A Maturity Benchmark across critical IT functions

These deliverables equip your team to make confident, aligned decisions—whether you work with Sourcepass or not.

What's Next?



After assessing your environment and aligning with business goals in Phases 1 and 2, our next phase is where everything comes together.

PHASE 3: STRATEGIZE

Technology Roadmap & Prioritization

✦ ✦ **Objective: Turn insight into action with a clear, phased, and financially predictable roadmap that aligns IT with your business strategy and operational reality.**

After assessing your environment and aligning with business goals in Phases 1 and 2, this phase is where everything comes together. The goal is not just to propose technology improvements—but to build a practical, prioritized plan that drives real outcomes and keeps your business in control of cost, timing, and impact.

What Happens in This Phase

Strategic Planning Workshop

Led by your Sourcepass Virtual CIO (VCIO) and Client Strategy team, this collaborative session ensures we:

- Define key business priorities and operational constraints
- Identify optimal timing for change based on seasonality and business cycles
- Establish budget parameters and desired financial models (CapEx vs. OpEx)
- Align leadership around clear goals for technology modernization

This workshop serves as the foundation for a plan that's realistic, achievable, and tailored to your organization's unique journey.

Technology Roadmap Development

We then translate strategic inputs into a detailed roadmap, categorized into three critical dimensions:

- **Quick Wins:** Low-lift, high-impact initiatives that build momentum
- **Must-Do Items:** Urgent or high-risk gaps that require near-term action
- **Strategic Growth Projects:** Long-term investments that enable scale and innovation

Your roadmap includes:

- A visual timeline that aligns initiatives with business rhythms and change tolerances
- Detailed initiative descriptions with rationale and business impact
- Budget forecasting that maps both operational and capital expenses
- Layering of innovation opportunities—such as automation, cloud, or AI—based on readiness

PHASE 3: STRATEGIZE

Technology Roadmap & Prioritization

MAPS Framework Overlay

Every element of the roadmap is evaluated through the MAPS lens, ensuring that your technology investments are strategically sound and operationally grounded:

- **Mitigate Risk:** Address critical vulnerabilities and compliance gaps
- **Align with Business Goals:** Tie each initiative to outcomes that matter to leadership
- **Predictability:** Ensure clear expectations around timing, cost, and complexity
- **Sustain Operations:** Keep day-to-day productivity and continuity protected during change

The result is a roadmap that not only advances your IT maturity but also strengthens organizational resilience.

Our Approach

➤ Predictability is Baked In

Roadmaps include detailed financial forecasting, change planning, and workload alignment—so nothing comes as a surprise.

➤ Strategic + Tactical

We don't just hand over a wish list—we guide you to a plan that balances urgent needs with future growth, backed by achievable next steps.

➤ Business-First, Not Just Tech-First

Everything is evaluated through the lens of business value, not just technical enhancement. This ensures leadership buy-in and real ROI.

Why Does this Matter?

Technology only drives success when it's part of a bigger strategy. Without a structured plan, businesses risk over-investing in the wrong tools, under-preparing for change, or simply reacting instead of progressing.

This phase brings clarity. It gives you the power to lead transformation—on your terms, with clear priorities, aligned teams, and manageable change.

What's
Next?



Next, we ensure your technology investments are implemented smoothly, efficiently, and with your end users in mind.

PHASE 4: EXECUTE

Project Implementation & Optimization

✦ ✦ **Objective: Bring your strategic roadmap to life with seamless project execution, transparent communication, and measurable outcomes—without disruption to daily operations.**

In this phase of the Sourcepass Technology Planning Playbook, strategy becomes action. Backed by expert project teams, robust platforms, and white-glove service, we ensure your technology investments are implemented smoothly, efficiently, and with your end users in mind.

What Happens in This Phase?

Execution via Project Teams or Co-Managed Models

Whether you need full-service implementation or support alongside your internal IT team, Sourcepass offers flexibility to match your operating model.

- **Dedicated Project Teams:** Our specialists lead the initiative end-to-end
- **Co-Managed Execution:** We work in tandem with internal IT, respecting your in-house expertise
- **VCIO Oversight:** Strategic alignment remains intact with ongoing executive-level guidance

Change Management & Enablement

Technology alone doesn't drive results—people do. That's why we support every implementation with:

- **Stakeholder Communication Plans:** Ensure buy-in and clarity across leadership, departments, and end users
- **End-User Training:** Equip employees with the knowledge and confidence to adopt new systems
- **Enablement Resources:** Customized guides, documentation, and onboarding sessions for smoother transitions

Quest® Portal Access

Our proprietary Quest® platform powers every aspect of execution with real-time visibility and communication:

- Project timelines, status, and milestones
- Centralized documentation and deliverables
- Integrated ticketing and support
- Executive dashboards for stakeholder tracking



[Learn more about Quest® >](#)

PHASE 4: EXECUTE

Project Implementation & Optimization

Sourcepass Differentiators

In this phase of the Sourcepass Technology Planning Playbook, strategy becomes action. Backed by expert project teams, robust platforms, and white-glove service, we ensure your technology investments are implemented smoothly, efficiently, and with your end users in mind.



White-Glove Project Management

We don't just complete tasks—we manage every detail, keep you informed, and ensure success through proactive oversight.



Automation via ROCaaS

Our Robotic Operations Center (ROC) streamlines repetitive tasks and workflows to reduce implementation time, minimize manual effort, and lower risk.



Clarity & Accountability via Quest®

With full transparency, you know exactly what's happening, what's next, and where each initiative stands.

Why It Matters

Even the best strategy can fail without disciplined, effective execution.

This phase ensures your roadmap isn't just a plan—it's a reality. With Sourcepass by your side, your teams experience minimal disruption while seeing tangible improvements in performance, security, and productivity.

You also gain a repeatable framework for future initiatives, setting your organization up for long-term success.

What's Next?



After implementation, Sourcepass remains your long-term partner—continuing to support, optimize, and evolve your IT landscape as your business grows

Continuous Innovation & Strategic Check-ins

✦ ✦ **Objective: Maintain alignment, continuously improve, and stay ahead of risk and disruption through proactive engagement, innovation, and planning.**

Welcome to the Final Phase!

The final phase of the Sourcepass Technology Planning Playbook isn't about closing a chapter—it's about keeping momentum. As your organization grows and evolves, so should your technology. Through structured reviews, new innovations, and ongoing strategic guidance, we help you turn your roadmap into a dynamic advantage.

What Happens in This Phase?

Quarterly Business Reviews (QBRs)

Every quarter, Sourcepass facilitates a strategic check-in to review progress, uncover new needs, and adapt the plan.

- **Roadmap Progress Review:** Evaluate what's been completed and what's next
- **Priority Adjustments:** Shift focus as business conditions change
- **Budget & Timeline Reassessment:** Ensure financial predictability remains intact

These sessions keep technology aligned with evolving business strategies, ensuring long-term relevance and ROI.

New Tech Briefings & Innovation Pilots

Technology moves fast—so do we. We keep you informed and equipped with emerging innovations that offer real value.

- **Emerging Tech Briefings:** AI, cybersecurity, automation, cloud, and more
- **Innovation Pilots:** Test small, scale smart—try new tools in sandbox environments before full rollouts

Our team filters the noise to bring you only the most relevant innovations tied to your goals.

Ongoing Learning & Quest® Feature Rollouts

Technology is only as good as its adoption. That's why we support your team with regular education and engagement.

- **Learning Sessions:** Webinars, how-to guides, and custom training
- **Quest Enhancements:** New functionality and user features that improve visibility, access, and efficiency
- **Utilization Optimization:** Ensure your teams are getting maximum value from existing tools

We help you build a culture of tech-forward thinking across your organization.

Continuous Innovation & Strategic Check-ins

Our Approach

In this phase of the Sourcepass Technology Planning Playbook, strategy becomes action. Backed by expert project teams, robust platforms, and white-glove service, we ensure your technology investments are implemented smoothly, efficiently, and with your end users in mind.



Strategy Never Stops

Your roadmap isn't a one-and-done. It evolves with your business. We treat it like a living document —always relevant, always aligned.



Innovation as a Service

We don't wait for you to ask. Our dedicated innovation teams actively surface opportunities, bringing fresh thinking into every review.



No Internal Burden

You get the benefit of cutting-edge tools, insights, and strategy—without having to build out additional internal capacity or chase trends.

Why It Matters

Sustainable success doesn't come from one good project. It comes from an ongoing commitment to strategy, innovation, and user impact.

By embedding regular review cycles and future-focused thinking into your operating rhythm, Sourcepass helps you avoid stagnation, respond to new risks, and capitalize on the next wave of opportunity.

Looking Ahead



Phase 5 is not the end; it's the beginning of your long-term partnership with Sourcepass. We're here to ensure your IT remains a competitive advantage year after year!

AWARD-WINNING IT

About Sourcepass

2,200+

Clients

500+

Team Members

97%

CSAT Score

9

Locations

At Sourcepass, we're redefining what it means to work with an IT partner. We deliver more than support; we deliver transformation.

By combining excellent service, strategic guidance, and proprietary innovation, we help organizations simplify technology and amplify results. Our award-winning team provides 24/7 in-house expertise through [Quest®](#), our intelligent IT management platform, ensuring complete visibility, proactive security, and smarter decision-making.

With local roots and national reach, Sourcepass empowers businesses across industries to focus on what matters most: their people, their mission, and their growth. Let's work together on what matters most: empowering your teams, protecting your data, and enabling your growth.



Dedicated to excellence.

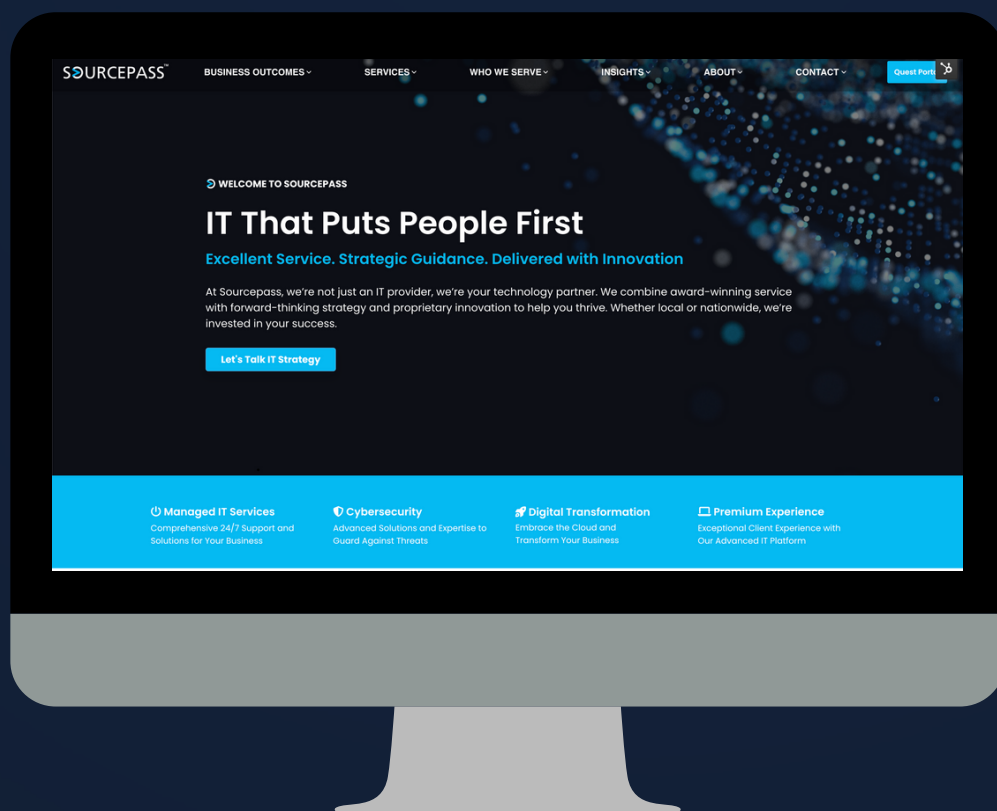
Sourcepass has achieved SOC 2 Type II and ISO 27001 certifications, reflecting our commitment to safeguarding the confidentiality, integrity, and availability of data, environments, and cybersecurity processes for both customers and trusted partners alike.



**SOC 2
TYPE II
CERTIFIED**



Take control of your digital universe.



Visit sourcepass.com to start your digital transformation journey today.

