FULL ON CONSULTING

IT & AI Assessment

Findings, Recommendations and Roadmap

Prepared for	**Lakeside Components, Inc.** (fictional), Board of Directors and Executive Team
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Engagement	6-week assessment · 14 interviews · 7 dimensions
Status	Final

About this sample. This report shows the structure and depth of a Full On Consulting IT & AI Assessment. Lakeside Components is a fictional company, and its people, numbers and findings are illustrative. The format, rating scales and level of detail are drawn from real assessments Full On has delivered. A full client report typically runs 30 to 50 pages; this sample is condensed.

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1. Executive Decision Memo

Overall grade

C+

Stable but not aligned

Bottom line: Lakeside's systems are stable and its security is better than most companies its size. The problem is how IT is run. There is no shared list of priorities, no owner for most projects and no way for leadership to see what IT is working on. Fix that first; most of the technology spending the team has asked for can wait two quarters.

Three decisions for leadership

Decision	Our recommendation	When
1. Refresh the data center or move to the cloud?	Move the ERP and file services to a hosted cloud model at the next hardware renewal; keep shop-floor systems on-site. Ten-year cost is within 5% either way, but the cloud option removes a single point of failure and two key-person risks.	Decide by Q2, before the server lease renews
2. Keep building custom software?	Stop new development on the custom quoting tool. Configure the ERP's quoting module instead, and support the existing tool only until the switch.	Freeze now; replace within 12 months
3. Who leads IT?	Hire an IT Director who can lead people and talk to the business. Bridge the gap with a fractional CIO for 6 to 9 months.	Start search in 30 days

> **Where the time goes:** the IT team spends about 40% of its week on unplanned requests that arrive by email, hallway conversation and help desk ticket. Better intake gives most of that time back to planned work.

2. Background, Objectives and Approach

Background

Lakeside Components is a privately held manufacturer with about 600 employees, three plants and a growing distribution business. The board asked for an independent view of IT after two years of delayed projects and rising spending. Business leaders reported that they could not see what IT was working on, that requests disappeared into the help desk, and that a three-year eCommerce project had consumed most of IT's capacity.

Objectives

- Give the board an independent, vendor-neutral view of IT's people, processes and technology.
- Answer the cloud-versus-on-premises question with costs, risks and a recommendation.
- Assess readiness to use AI safely and where it could pay off first.
- Deliver a prioritized, three-year roadmap the leadership team can act on.

Approach

Week	Activities
Week 1	Kickoff with sponsors; document request (org chart, budget, contracts, architecture diagrams, project list, security reports)
Weeks 2–3	14 interviews: CEO, President, CFO, COO, CMO, 4 business unit leaders, IT manager and 4 IT staff; on-site visit to the main plant
Weeks 4–5	Analysis across 7 dimensions; ten-year cost model for infrastructure options; draft findings reviewed with the IT manager for accuracy
Week 6	Final report, two-page decision memo and readout to the executive team and board

How findings are rated

Scale	Definition
Impact	High significant effect on operations, revenue or risk · Medium likely moderate effect · Low minor, or a strength to maintain
Priority	**Immediate:** address within 30 days · **Mid term:** 30–90 days · **Long term:** 90–180 days
Complexity	**Low:** process change, under 1% of IT budget · **Moderate:** project-level change, under 10% · **High:** major program, more than 10% of IT budget

3. Scorecard and Strengths

Dimension	Rating	Summary
Strategy & alignment	Needs attention	Company goals are clear, but IT has no plan tied to them and no seat in leadership meetings.
Governance & process	Needs attention	No project intake, enhancement process or project management. Priorities change weekly.
Applications & ERP	Caution	ERP is current but underused; two custom apps add maintenance cost and key-person risk.
Infrastructure & cloud	Caution	Reliable today; servers reach end of life in 14 months; one administrator knows the environment.
Cybersecurity	On track	MFA, endpoint detection and annual penetration testing in place. Backups not tested in a full restore.
Data & AI readiness	Caution	Customer and item data are inconsistent; staff use AI tools with no policy.
People & organization	Needs attention	Capable technicians, no management layer; the business finds IT hard to work with.

Strengths to keep

- Strong executive sponsorship. The CEO and CFO want IT to succeed and will make decisions.
- Security fundamentals are ahead of peers: MFA everywhere, managed detection, and a recent clean penetration test.
- The ERP is on a current version and was upgraded twice in the last 18 months without business disruption.
- The IT team knows the systems deeply and wants a clearer way of working.
- Vendor contracts were negotiated well; rates are at or below market.

4. Findings by Dimension

Condensed. A full report lists 25 to 40 findings, each with the evidence behind it.

Governance & process

Observation	Impact	Priority	Recommendation	Complexity
No project intake. Work starts when someone asks, and the loudest request wins.	High	Immediate	One intake form and one list. Rate every request on four priority levels agreed by leadership.	Low
Projects run without a plan, owner or business case.	High	Immediate	Require a one-page charter with a business owner and expected value before work starts.	Low
ERP enhancement requests go through the help desk.	Medium	Mid term	Move enhancements to the intake process; keep the help desk for break-fix.	Low
The IT budget is built from last year's spending.	High	Long term	Start budgeting in October with each department, from company goals.	Moderate

Applications & ERP

Observation	Impact	Priority	Recommendation	Complexity
Custom quoting tool is 18 months behind plan; sales still re-keys quotes into the ERP.	High	Immediate	Freeze new development. Evaluate the ERP's quoting module against the remaining requirements.	Moderate
Users don't know what the ERP already does, so they ask for custom work.	Medium	Mid term	Quarterly lunch-and-learns with the ERP vendor; name a business owner for each module.	Low
Plant-floor barcode scanners run an operating system that is no longer supported.	Medium	Mid term	Replace in the next budget cycle, using the ERP's supported mobile warehouse app.	Moderate

Infrastructure & cloud

Observation	Impact	Priority	Recommendation	Complexity
Host servers and storage reach end of support in 14 months.	High	Mid term	Decide cloud vs. refresh by Q2 using the ten-year model in Appendix A.	High
One administrator holds most infrastructure knowledge; little documentation.	High	Immediate	Document the environment; pair a second person or a managed provider on every critical system.	Low

Cybersecurity

Observation	Impact	Priority	Recommendation	Complexity
Backups run nightly but a full restore has never been tested.	High	Immediate	Run a full restore test of the ERP this quarter; repeat twice a year.	Low
No incident response plan beyond the managed provider's contract.	Medium	Mid term	Write a one-page plan with roles, contacts and a tabletop exercise with leadership.	Low
MFA, endpoint detection and penetration testing are in place.	Low	—	Maintain. A strength.	—

People & organization

Observation	Impact	Priority	Recommendation	Complexity
No IT leader with management experience; the IT manager is the senior technician.	High	Immediate	Hire an IT Director; use a fractional CIO to bridge and to define the role.	Moderate
Business leaders describe IT as hard to work with; shadow IT is growing.	High	Mid term	Monthly IT and business steering meeting; coach the team on working with the business.	Low
Business owners don't know their role on projects.	Medium	Mid term	Define project roles (sponsor, owner, lead) and train the business on them.	Low

Strategy & alignment

Observation	Impact	Priority	Recommendation	Complexity
Each department has goals for the year, but IT's plan isn't tied to them.	High	Mid term	Map every IT initiative to a company goal; drop or defer what doesn't map.	Low
Acquisitions are planned, but there is no playbook for bringing new companies onto Lakeside systems.	Medium	Long term	Build a 100-day IT integration playbook before the next deal.	Moderate

5. AI Readiness Snapshot

Lakeside is not ready for production AI, and that is normal for a company at this stage. Staff are already using AI tools on their own, so the first step is a policy, not a project.

Area	Rating	What we found	First step
Data quality	Not ready	Duplicate customer records and inconsistent item numbers across plants.	Master data cleanup with a business owner for each domain.
Platform	Partly ready	Microsoft 365 and a current ERP; no data warehouse or reporting layer.	Stand up a reporting layer on the ERP before adding AI.
Governance	Not ready	No AI use policy; customer data has been pasted into public tools.	Publish a one-page AI policy and approved tools list in 30 days.
Skills	Partly ready	Interest is high; two analysts already build ERP reports.	Train a small group of power users on approved tools.
Use cases	Ready to pilot	Quote turnaround and invoice matching are clear, measurable candidates.	One 90-day pilot with stop criteria set up front.

> **Recommendation:** Policy in 30 days, data cleanup in 6 months, then one pilot with a named owner, a cost cap and a measurable target. Avoid buying an AI platform until the data and reporting layer exist.

6. Prioritized Recommendations

#	Recommendation	Impact	Priority	Complexity	Owner
1	Create one intake process and one prioritized list for all IT work	High	Immediate	Low	Fractional CIO
2	Start an IT Director search; bridge with a fractional CIO	High	Immediate	Moderate	CEO / CFO
3	Test a full backup restore of the ERP	High	Immediate	Low	IT Manager
4	Publish an AI use policy and approved tools list	High	Immediate	Low	CFO / IT
5	Freeze custom quoting tool development; evaluate the ERP quoting module	High	Immediate	Moderate	COO / IT
6	Monthly IT and business steering meeting	High	Mid term	Low	Fractional CIO
7	Decide cloud vs. refresh using the ten-year model	High	Mid term	High	CFO / Board
8	Document infrastructure; remove single points of knowledge	High	Immediate	Low	IT Manager
9	Master data cleanup with business owners	Medium	Mid term	Moderate	Sales / Ops
10	Goal-based annual IT budget, built with each department	High	Long term	Moderate	CFO
11	Incident response plan and leadership tabletop exercise	Medium	Mid term	Low	IT / Security partner
12	100-day IT integration playbook for acquisitions	Medium	Long term	Moderate	Fractional CIO

7. Roadmap: Now, Next, Later

Cost ranges are order-of-magnitude estimates for planning, not quotes.

Now · 0–90 days

- Intake process and single priority list
- Steering meeting cadence
- AI policy
- Backup restore test
- Infrastructure documentation
- IT Director search starts

Est. cost: $15K–$30K plus fractional CIO time

Next · 3–12 months

- Cloud migration of ERP and file services (if approved)
- ERP quoting module replaces the custom tool
- Master data cleanup
- Reporting layer on the ERP
- IT Director onboarded; hand-off from fractional CIO

Est. cost: $180K–$260K one-time; run cost roughly flat

Later · 12–36 months

- First AI pilot in production
- CRM and quoting improvements
- Acquisition integration playbook in use
- Three-year IT strategy refresh

Est. cost: $120K–$200K over two years

Appendix A (excerpt): Ten-year infrastructure options

Option	10-year cost (est.)	Key risks	Fit
Refresh on-premises	$1.9M–$2.1M	Key-person risk; capital outlay every 5 years; virtualization licensing changes	Acceptable
Hosted cloud (ERP + file services)	$1.8M–$2.2M	Monthly cost growth; migration effort; bandwidth at plants	**Recommended**
Hybrid (shop floor on-site)	Included above	Two environments to manage	Part of recommendation

8. Governance Model and Next Steps

How IT work will be run

Forum	Cadence	Purpose
Executive steering committee	Monthly	Approve priorities, budget and major decisions; review roadmap progress
IT and business touch-bases	Every 2 weeks	Each department reviews its requests, status and upcoming work
Intake review	Weekly	Rate new requests, assign owners, move ready items onto the plan
Board update	Quarterly	Scorecard, risks, roadmap status and decisions needed

Priority definitions

Level	Definition
#1	Mission critical: needed for daily operations; severe workarounds in place or sales and shipments at risk
#2	Cross-department: needed to meet the company's annual goals
#3	Department improvement: moves a team from good to great
#4	Nice to have: report changes, dashboards, basic improvements

Next steps

1. Review this report with the executive team and confirm the three decisions in the memo.
2. Launch the 0–90 day actions, with a named owner for each.
3. Schedule follow-up checkpoints at 90 and 180 days to review progress against these recommendations.

> **About Full On Consulting.** Full On Consulting provides IT & AI assessments and fractional and interim CIO leadership for mid-market companies. Every assessment is led by Donald D. Hook, a former CIO and CTO with 25+ years of enterprise IT leadership. We sell no software and take no vendor commissions.
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