



Free Technology Audit Whitepaper

Are you looking for a way to streamline and optimize your technology systems? Our introductory free audit service is the perfect place to start.

We understand that investing in technology can be overwhelming, and selecting the right systems and processes is crucial for achieving your business goals and objectives. Our audit service is designed to assess the effectiveness of your current technology systems and workloads and provide recommendations for improvement.

Our audit process includes a review of your goals and objectives, current technology deployed, and all customer-facing workloads in general. We'll perform an in-depth audit and review of the workloads that CRM is currently handling, with a discussion and review of their effectiveness and provide input on how they could be improved.

We understand that each business is unique, therefore our audit service is tailored to your specific requirements. At the end of the audit, we'll provide you with a comprehensive report of our findings and recommendations for improvement.

Our goal is to help you understand how your technology systems can evolve to better align with your business goals and objectives, and how it could help improve customer trust and employee engagement. If you're ready to take the first step towards optimizing your technology systems, contact us today to schedule your free audit. We're here to help!

Business Overview

The first step in our technology audit is to take a closer look at your business. We want to make sure that we understand your business model, industry, and current market conditions. This way, we can tailor our audit to your specific needs and identify any pain points or areas for improvement.

During our review of your business overview, we'll work to:

- Identify your unique selling points and differentiators within your industry
- Understand your target audience and ideal customer profile
- Review your current sales cycle and identify any inefficiencies or bottlenecks
- Get to know your team and their roles and priorities
- Identify any areas of opportunity for increased efficiency or improved customer experience

Our goal is to gain a better understanding of your business goals and objectives, and how we can help you achieve them. We understand that your time is valuable, and we'll work to ensure that our audit process is streamlined and non-disruptive to your day-to-day operations.

So, let's take some time to review your business overview together. Contact us today to schedule your free audit, and let's get started!

Technology Audit

After better understanding your business, it is time to dive into the technology audit. Our focus is on reviewing your current technology systems and workloads, with a particular emphasis on customer-facing workloads such as marketing, sales, customer service, and field service.

We believe that understanding your current technology systems and workloads is important because it provides a foundation to build upon. We can use it to help identify any gaps or inefficiencies that may be impacting your business. By taking a closer look at your current technology systems

and workloads, we can provide recommendations for improvements that are tailored to your specific needs.

At Optrua, our focus is on improving customer experience and employee engagement through agile development best practices and a continuous improvement mindset. Our technology audit includes a review of the following:

- Your overall technology strategy and alignment with your business goals and objectives
- Your current technology systems and how they are being utilized
- Your current workloads, including marketing, sales, customer service, and field service
- Your data quality and its impact on your business processes

The technologies that may be included in a Technology Audit can vary depending on the specific needs and requirements of the business, but some common ones may include:

- Customer Relationship Management (CRM) systems
- Enterprise Resource Planning (ERP) systems
- Marketing Automation platforms
- Sales and Marketing tools
- Business Intelligence and Analytics tools
- Collaboration and Communication tools
- Cybersecurity and IT infrastructure
- Mobile devices and applications
- Cloud services and infrastructure
- Network and server infrastructure
- Data storage and management systems

Deliverables: We understand that investing in technology can be a daunting task, and we want to ensure that our audit process is streamlined

and non-disruptive to your day-to-day operations. The audit contains the following deliverables:

1. Executive Interview: Discuss business goals & objectives (45 minutes)
2. Stakeholder Interview: Discuss business processes (45 minutes)
3. IT Interview: Discuss IT objectives, goals & processes (45 minutes)
4. Completed Executive, Stakeholder, and IT questionnaires
5. Professional Audit Report & Recommendations

Our team of experts will work with you to ensure that we have a complete understanding of your current systems and workloads.

So, let's get started on your free technology audit. Contact us today to schedule your audit, and let's work together to optimize your technology systems and achieve your business goals!

Audit Report and Recommendations

Once we've completed the technology audit, we'll prepare a written audit report summarizing our findings and recommendations. This report will be a comprehensive summary of our assessment, highlighting any gaps or inefficiencies we identified and providing recommendations for improvement.

We understand that the success of a technology audit is not just about identifying areas for improvement but also about providing actionable recommendations. As experts in customer engagement systems, we leverage agile development best practices and a continuous improvement mindset to provide tailored recommendations that will improve your customer experience and employee engagement.

During the audit, we'll identify opportunities to streamline your current technology systems and workloads, including your customer-facing workloads such as marketing, sales, customer service, and field service. We'll also take a close look at your data quality and provide

recommendations on how to improve it to increase the accuracy of your business insights and decision-making.

Our audit report will include a roadmap for implementing the recommended improvements, with options for Optrua's assistance as needed. Our team of experts will work with you to ensure that the implementation process is as streamlined and non-disruptive as possible, and we'll provide ongoing support to ensure the success of your technology initiatives.

By completing this audit and providing a comprehensive report and recommendations, we can help start you on the path to:

- Enhance your customer experience and employee engagement
- Streamline your technology systems and workloads to increase efficiency and productivity
- Improve data quality to enable better business insights and decision-making
- Align your technology strategy with your business goals and objectives

Don't let inefficiencies in your technology systems hold you back from achieving your business goals.

[Contact us](#) today to schedule your free technology audit and take the first step towards optimizing your technology systems and achieving your business objectives.