

# TECHNOLOGY STRATEGY FOR THE NEXT ERA OF DEVELOPMENTAL SERVICES

# Today's Presenter



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**Scott Trevithick** is the Chief Executive Officer of **Asurtec**, an Ontario-based IT Managed Services and Data Management firm supporting more than 70 community not-for-profit organizations, among them many developmental services organizations.



# Today's Objectives

01

**A clear understanding of the technology imperatives arising from *Journey to Belonging***

Why efficiency, useful data and cost-effectiveness are more important than ever

02

**A strategically strong technology roadmap**

Which aligns infrastructure and collaboration platforms with service and funding realities.

03

**Concrete strategies to modernize IT operations**

Including modern, low-cost IT managed services, high value network technologies, Microsoft 365 cloud services, practical data management, cybersecurity and a case study.

# The Sector Shift



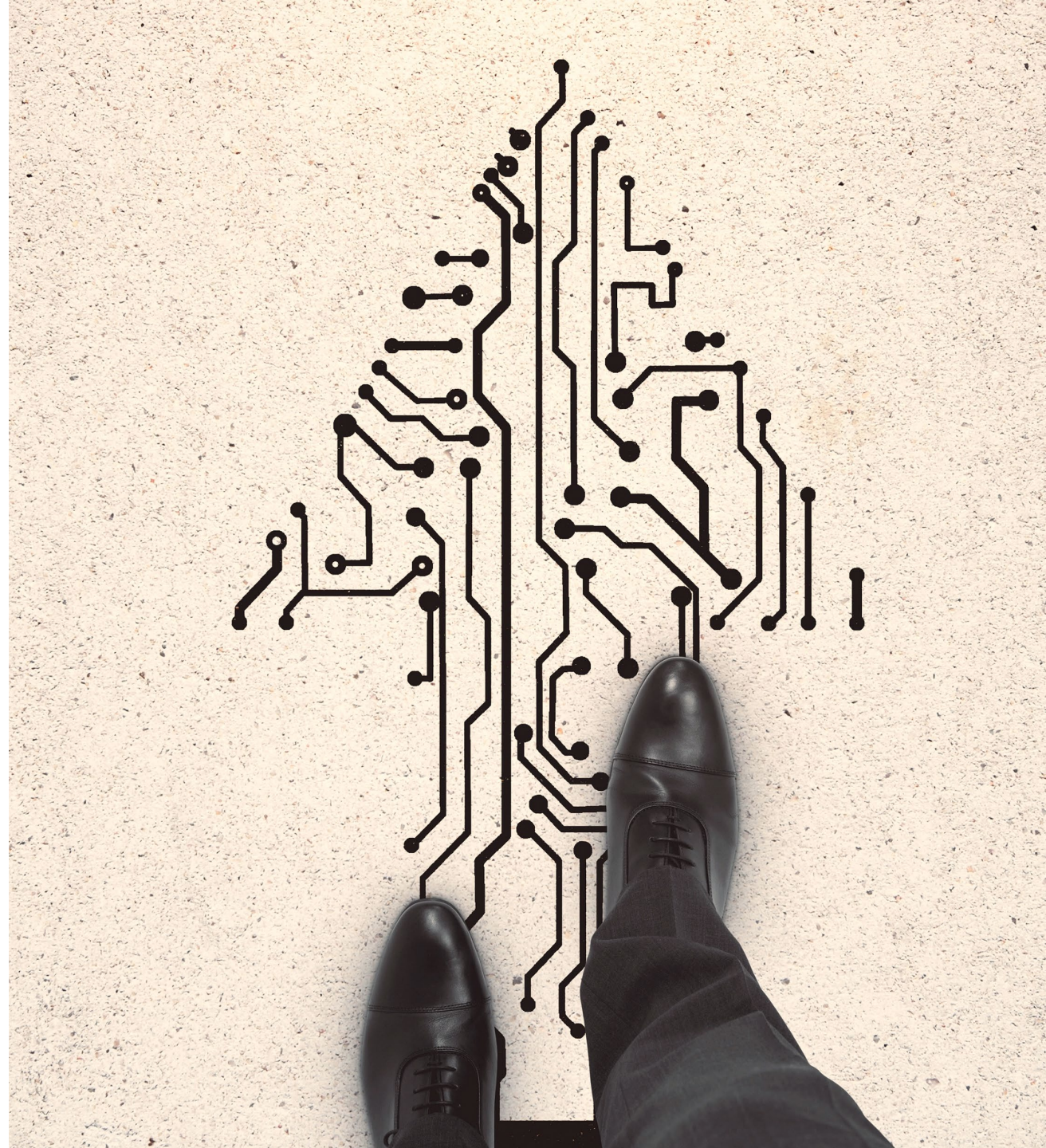
# Journey to Belonging Implications

- Journey to Belonging is accelerating the pre-existing shift to individualized funding models
- May see more volatility in funding streams
- For-profit providers entering the market, focused on lucrative service areas
- Overall effect: free market dynamics and increased competition

# Professionally Managed IT Infrastructure

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# IT Managed Services **Highlights**

## WHAT MODERN IT MANAGED SERVICES LOOKS LIKE

### **HIGHLY AVAILABLE, RESPONSIVE, FIXED-RATE HELPDESK**

Friendly, responsive helpdesk that mirrors your hours of operation

Rapid support:

- phone answered by a human
- remote-first support
- first-call resolution is aim

Same-day on-site support available when necessary

Fixed rate, unlimited pricing incentivize provider to minimize IT problems

### **REMOTE MANAGEMENT AND MONITORING (RMM) AGENT**

RMM tools enable time and cost savings through:

- rapid end-user support through remote screen sharing sessions
- Operations on large groups of computers or all computers
- Apply consistent policies across computers and servers
- Monitor and receive alerts for devices across the organization
- Basic remote lock, logoff and restart if device lost or stolen.



# IT Managed Services: **Security Tools**

## **MOBILE DEVICE MANAGEMENT (MDM) – PRIVACY AND SECURITY CONTROLS**

Example: Microsoft Intune, included with MS 365 Business Premium license

Apply consistent, security compliant profiles across organization-owned and personal phones, tablets and computers

Intune exceeds RMM security: powerful remote lock, wipe, factory reset for Windows computers, Android and iOS devices. Lock agency applications on agency and personal devices.

## **CENTRALLY MANAGED ENDPOINT SECURITY (ANTI-VIRUS)**

Central Managed Endpoint security provides more oversight and much better security at lower cost than decentralized consumer-oriented anti-virus products. Usually provided by IT Partner but also available through Microsoft with MS 365 Bus. Premium license (Defender for Business).



# IT Managed Services: Network

## CLoud-MANAGED NETWORK

Ubiquiti is a reliable, durable, high-quality cloud-managed networking brand with disruptively low pricing

Ubiquiti access points and switches have 85% of the features of Cisco Meraki for about 25% the price

## CONSISTENT, SECURE WiFi SSID (WIRELESS NETWORK)

Using a cloud-managed network, your IT partner can create a “single” consistent wireless network across all your sites

Agency laptops and tablets automatically connect as soon as they are powered up, and staff can sit where they like (not tethered to a cable).

“Wireless just works” means less friction, fewer support requests and lower support costs



# IT Partner: **Your Strategic Partner**

## **YOUR IT PARTNER SHOULD BE A STRATEGIC ADVISOR AND PARTNER**

Your IT partner should be more than just the company that keeps computers and systems running smoothly.

To compete effectively, you need to be at your best, and this means a partner who:

- 1) Understands your sector and the pressures you're facing
- 2) Understands your organization and what makes it exceptional
- 3) Will suggest technical solutions that support the services you provide and your roadmap for the future
- 4) Will customize and maximize the value of services in the marketplace for you

Your IT partner should be more than a service provider; they should be a strategic partner, working to ensure your tech is the rocket fuel for your social impact mission.



# Microsoft 365



# MS 365 Office Computing Evolved

## MS 365 Provides Huge Advantages over On-Premises and Data Centre Servers

Improvements in security, ease of use, reduction in administrative overhead, flexibility and mobility for end users.

## New Kids on the Block: Entra ID and Intune

Entra ID (formerly Azure AD) fills the role of Active Directory  
Intune fills the role of Group Policy and MDM

## MS 365 Enables Mobility

Staff can now login from anywhere without a VPN (and cost of VPN license)  
They can access all the resources and do all the things (and more) they once did in the office anywhere they have basic Internet

Organizations can use GeoIP Location rules to restrict logins to Canada only

Don't care about *mobility*? Consider how this can simplify disaster recovery planning



# MS 365: Employee Favourites

## 01 Multi-user Editing

- Multiple users spread across your region can edit the same Word, Excel, PowerPoint documents in real-time

## 02 Easy Sharing

- Users can share a single file or folder with a colleague or external contact (permission dependent).
- No more requests to IT and no more copies floating around e-mail.

## 03 Powerful Search

- Search across all sites (to which you have access) for documents. Search inside documents and using meta-data tags.

## 04 Automatic Save and Version History

- Automatic saving & version history means you can restore any version of a document at any time.

# MS Teams: More than Video Meetings

Channels	Applications	Chats	Devices
<p><b>Teams Channels</b></p> <p>Channels bring together <i>documents</i> with <i>communication</i>, and provide <i>forum posts, chats</i> and <i>document storage</i> for members of the channel/Team</p>	<p><b>Channel Apps</b></p> <p>Teams' channels can be extended with free and paid applications like Planner (project management), whiteboards, OneNote</p>	<p><b>Teams Chat</b></p> <p>Teams Chat is secure instant messaging with end-to-end encryption, controlled by the organization</p>	<p><b>On All Devices</b></p> <p>Teams runs on PCs, iPhones, Android phones and tablets, and Macs. Your chats and work travel with you and you can switch between devices</p>

# MS 365: Good Value for DS Agencies

## MS 365 (Free) App Ecosystem

Beyond the headliners like Word and PowerPoint, there are dozens of free apps included with your 365 Business license. E.g., *Bookings*

## Not-for-Profit Pricing

Business Series licenses for orgs with < 300 employees  
Enterprise (E1, E3, E5) licenses required for orgs with > 300 employees.

**Business Basic** and **E1** licenses are free (up to 300)

- Includes most of what we've discussed today. Main limitation: no desktop applications.

**Business Standard** and **E3** licenses add desktop applications

- Business Standard costs a little less than \$5/person/month

**Business Premium** and **E5** licenses add rich security features

- Business Premium costs a little less than \$8/person/month
- Adds:
  - MS Defender for Business (endpoint/AV software)
  - Intune MDM
  - Basic data loss prevention (DLP)
  - Encrypted e-mail and e-mail control
  - Self-service password reset.

# MS 365: Secure Collaboration

## SharePoint and Teams Natively support Secure Internal-External Collaboration

- SharePoint and Teams site is usually created to support an external collaboration
- Employees and external users (guests) can access from anywhere you allow (e.g., within Canada)

## Same Feature Set Staff Love

- Teams Channels include employees and guests as members
- Channels for posts, chats and shared document storage
- Teams chat with people outside the organization (safer than texting)
- Extensible with add-on applications
- Fully managed by the hosting organization



# Data: Foe to Friend

## Good Data will Support Efficiency and Rapid Adaptation

Good data management practices can help organizations adapt effectively to the changes brought by Journey to Belonging.

## Centralizing Data in Purpose-Built Systems – “Information Systems”

Data is easiest to gather and use when it is in a single, purpose-built application, an “Information system”.

Ideally,

- All HR data should go into your HRIS
- All financial data should go into your accounting software
- All client data should go into your Client Information System (AIMS, Nucleus, EMHWare)

Storing data in Word, Excel, Formstack or MS or Google Forms might be quick and easy but results in *data fragmentation*. These apps are not purpose-built and are not at all suited for data retrieval or reporting.

Centralized data can be integrated with other data, e.g., service use with costs and billing

# Data Strategy & Management

## 01 Vision & Objectives

- Purpose
- Alignment
- Success criteria

## 02 Data Governance & Stewardship

- Policies
- Ownership
- Classification
- Compliance
- Security

## 03 Data Architecture & Infrastructure

- Systems
- Storage
- Integrations
- Data Backups & recovery

## 04 Data Quality & Management

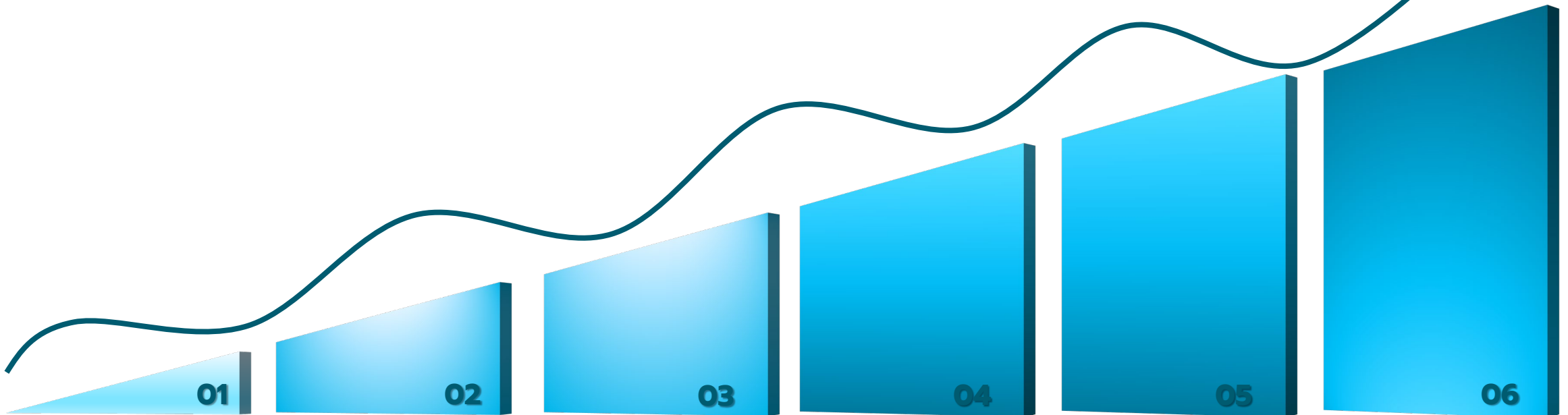
- Standards
- Validation
- Retention

## 05 Reporting & Analytics

- Reporting
- Dashboards
- Visualizations
- Performance reporting (diagnostic)

## 06 Training & Culture

- Culture
- Collaboration
- Continuous improvement
- Training



# Info Systems: Working? Not Working?

## Is your Info System Working?

Your HRIS, Accounting Software, or Client Information System **might not be working for you.**

Some signs of this are:

1. There is a lot of griping about it and people tell you it's not working 😊
2. Despite your systems, you have data in Excel and Word documents, Formstack, even paper
3. Gathering data for Ministry reports takes days and requires gathering or reformatting information in Excel
4. You cannot answer questions your Board or your leadership team have
5. You cannot use your data to evaluate service viability or demonstrate the difference you're making to service users, caregivers and donors



# Info Systems: Common Causes of Failure

## 01. Utility

You've outgrown the application, or you don't have one (you're using paper)

## 02. Configuration

The application can do everything needed but has not been *configured* properly

## 03. Training & Process

The application is configured properly, but staff are not using it properly

The **usual suspects** when your HRIS, Accounting, or CIS is not working for you

# Info Systems: **Let's Go Shopping!**

A **Structured Approach** to Buying an Information System Software



## **Select an Implementation Partner**

An experienced implementation partner will provide project management and change management throughout. This ensures a successful project and most vendors welcome it.

## **Needs Discovery & Requirements Document**

Identify all your needs using no-cost tools designed for to support this purpose and collate them in a requirements document

## **Procurement**

Issue an RFP or bidding process. Evaluate bids against the requirements document using quantitative scoring

## **Implementation**

Work with the selected vendor and an implementation partner to have the application properly configured for your needs

## **Training Support**

Work with the vendor and implementation partner to develop a training plan and train staff prior to Go Live

# Info Systems: Let's Fix It!

## When Your Information System does Not Need Replacing

A good implementation partner can help you to diagnose and *optimize* your Information System.

Thankfully, many of the steps for fixing are similar to buying:

1. Needs Discovery -> Requirements Document
2. Meet with Vendor & Determine if Existing System Meets Requirements
3. If Yes, identify the problem(s)
  - Configuration of application
  - Enabled Modules
  - Limits imposed by license
  - User error
    - a. Lack of discipline when entering data
    - b. Lack of understanding, need for more training
4. Address the problems, for example:
  - Enable an additional module
  - Upgrade licensing
  - Supplement staff training
  - Engage staff by showing them the data around *their* work



# Good Data: Is it Worth the Trouble?

## **J2B is Making Data More Important**

In an increasingly competitive marketplace, you will need data to compete effectively. You need data to evaluate services and identify your strengths (and weaknesses).

## **In what Services do you have *Comparative Advantage*?**

Answer questions your managers, directors and board have. With the rise of fee for service, an important question will be, “are we good at providing this service”. You want to focus on your “comparative advantage” – the services you deliver best. *Comparative Advantage does not mean “better than other providers” it just means better than other services you deliver.*

[Comparative advantage - Wikipedia](#)

## **Demonstrating Impact to Potential Donors, Service Users, and their Caregivers**

Imagine being able to show funders, potential donors, service users, and their caregivers – using data – the impact you’re having in the lives of the people you support.

We believe data will help you to build resilience, adapt to a changing environment, and perform at your best.

**We see getting data right as an investment in your future.**

# Cybersecurity



# Cybersecurity: The Risks

You do not hold highest value data, like the data that organizations such as financial institutions have.

Cybercriminals have no scruples about stealing money from not-for-profit organizations. They have done and will continue to do so. Attacks have cost not-for-profits tens or hundreds of thousands and been highly disruptive.

**Developmental Services:  
Not A High Value Target**

**Realistically,  
Everyone is a Target**

**Your Noble Mission Is  
Irrelevant**

**Best Approach: Be a Hard  
Target, Not an Opportunity**

Cybercriminals are opportunistic and will attack whenever they see a financial value. Many attacks are impersonal, automated and designed to cast as wide a net as possible.

Cybercriminals are looking for a return on their time. If they think they'll have to work hard for a financial reward, they will find other people or agencies that are more vulnerable.

# Cybersecurity: Multi-Pronged Approach

- 01 Physical Security**

This covers the physical world and topics like your server room or wiring closet and staff you have located at the front desk as gatekeepers to your office space.
- 02 Software Security**

This is very broad and includes next generation firewalls, e-mail scrubbing, web content filters, endpoint security (aka anti-virus). *You don't need to understand these words, but your IT partner sure does!*
- 03 Employee Training**

Most successful attacks exploit human nature. Investing in quality training for employees is a crucial element in a security strategy. This can include phishing simulations.
- 04 Secure Protocols (Controls)**

As with financial controls, you can implement all sorts of worthwhile protocols to protect your agency, like requiring employees to use a strong pass phrase (collection of unrelated words), to ensuring accounts are quickly disabled when no longer used.
- 05 All of the Above**

The best approach to security is one the incorporates all of the above as no one approach is adequate on its own.

# Case Example & Takeaways



# Case Study: Digital Transformation

## Profile:

- Multi-service agency with around 200 employees
- Around 8 physical sites spread across two counties
- Large on-premise server installation; very little in the cloud
- Significant administrative burden and worry for on-staff IT person

## The 8 Month Plan:

- Migrate on-premise MS Exchange to Exchange Online
- Migrate on-premise Windows File server to SharePoint
- Convert On-premise Active Directory Servers to EntraID Hybrid Join
- Setup SharePoint Sites as Teams sites
  - Each service area to have its own Teams site and channel
  - Teams sites for Management, Executive Team, Supervisors and some committees
- Train employees on SharePoint, Teams, OneDrive, New Outlook, Word, Excel, PowerPoint, MS Bookings, MS Forms
- Use Intune to enable block-level encryption on all computers
  - Agency computers have full access; personal devices can view and interact but cannot download, print, or forward (web-only access)

# Case Study: Outcomes

1. Staff and management very happy with the outcome. Describe it as the smoothest large project ever. We believe the single most important success factor was **staff training**
  - Staff received significant training on all applications
  - Staff could attend in-person or virtual training according to their preference
  - Staff could attend additional training sessions if they wanted
  - Recordings of training sessions are always available for viewing
2. Staff are **adopting SharePoint very quickly** but seem more nervous about Teams. (*Teams is rather busy and can be intimidating*).
3. IT person is happy with the outcome because his workload and worry have decreased as **overall staff capacity has increased**.
4. Risks have been dramatically reduced for the organization and **DR planning is much simpler** than before.
5. Financial benefits:
  - Replacing costly Zoom licenses with Teams (included with MS 365 licenses)
  - No need to reinvest in an expensive on-premises server farm

## Future plans:

- Bring all agency phones into Intune for better management
- Enable Self-Service Password Reset for staff
- Implement encrypted e-mail and e-mail controls
- Deploy Defender for Business for further savings on AV cost

# Takeaways: A Roadmap

**Select a capable IT partner** providing low-cost, responsive support, using modern tools & techniques, who will consistently provide strong strategic guidance.

**Move away from servers to Microsoft 365** to improve efficiency, increase security, enhance flexibility, reduce risk, simplify disaster planning, and lower costs.

**Centralize your data** in your information systems and invest in getting them working for you. Once your data is centralized it will be easier to report and integrate with other data sources.

All is for naught if you ignore **cybersecurity**: take a multi-pronged approach comprising physical security, software security, training, and security protocols.

IT projects, even large and transformative ones can get rave reviews – provided staff are adequately supported through **change management and training**.



**Questions?**

# Technology Strategy for the Next Era of Developmental Services

Reach out with questions to:

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