



Practice Advancement Program

Execution Workshop The Ideal TECHNOLOGY Stack

Workshop Description

Streamline infrastructure, people & process technology, and back-office operations applications, by developing a technology strategy for your practice. In this 4-week workshop you will take a comprehensive inventory of hardware and software in key areas of your practice, identify the gaps and redundancies, and create a path to your ideal technology stack. You'll implement an in-depth vetting process and define technology policies and governance strategies.

Syllabus

Week 1: Taking an Infrastructure Inventory

- Identifying the gear (hardware) you currently use, wish you were using or no longer need to use
- Identifying connectivity requirements
- Identifying hardware security policies and potential gaps

Week 2: Taking an Application Inventory

- People and Process Applications
- Operational Applications
- Identifying redundant applications
- Identifying gaps in the stack

Week 3: Vetting Technology

- Comparing Feature Sets
- Vetting Beyond the Features – Company, Support, Peer Evaluations

Week 4: Crafting a Technology Plan

- Identifying Objectives based on Greatest Outcomes
- Prioritizing Objectives
- Mapping a Realistic Timeline

*PREREQUISITES: This workshop is available to Advantage and Premium members who have completed the 10-week Ideal Practice Course.