

Do You Need Fractional CIO Support?

A guide for CFOs to evaluate IT maturity, uncover gaps, and determine where CIO expertise is needed.

The Challenge:

Most privately held companies under \$50M recognize the importance of financial stability, yet few devote the same attention to IT maturity. As a result, systems are left unmonitored, underutilized, or unmanaged—creating hidden risks and unnecessary costs.

Companies often already possess the right tools but need assistance in fully implementing and deriving value from them.

The Solution:

Engaging a fractional CIO quickly brings structure, control, and alignment between technology and business performance, turning technology from a hidden liability into a managed asset.

Quick Assessment:

Review and rate the areas below to gauge your organization's current IT maturity.

Guide:

- ☒ Absent
- ☒ Developing
- ☒ Optimized



Protect Value

What could go wrong?

- ☐ **IT Health & Risk Assessment:**
 - ☐ Establish a baseline for infrastructure, systems, security, and spending, producing a clear, CFO-readable risk scorecard.
- ☐ **Backup & Recovery Validation:**
 - ☐ Test and document recovery processes for key systems like QuickBooks and CRM, quantifying downtime costs and readiness.
- ☐ **Security Baseline & Pen Test Lite:**
 - ☐ Verify key security measures such as MFA, patching, endpoint protection, and admin controls, and provide a prioritized remediation plan.
- ☐ **Incident Response & Continuity Plan:**
 - ☐ Define roles and responsibilities for system failures, creating simple, actionable, and printable plans.
- ☐ **IT Policy & Access Control Implementation:**
 - ☐ Implement right-sized policies for access, device use, offboarding, and AI acceptable use to prevent data exposure in free tools.



Control Cost

What are we spending and why?

- ☐ **Application & Vendor Inventory:**
 - ☐ Document all systems and costs, identifying redundancy, gaps, and unsupported tools.
- ☐ **Managed Service Provider Review:**
 - ☐ Confirm the current IT provider's coverage, security, and value.
- ☐ **Infrastructure Modernization Checkup:**
 - ☐ Assess the age and readiness of Wi-Fi, laptops, and servers to support upcoming initiatives, ensuring all machines are upgraded to Windows 11 and fully patched.



Enable Growth

Can IT support where we're headed?

- ☐ **Data Visibility & System Integration:**
 - ☐ Connect existing systems for faster, more accurate reporting.
- ☐ **Technology Roadmap for Growth:**
 - ☐ Align IT investments with strategic goals, expansions, system upgrades, and acquisitions.