



Technology Health Assessment

ILLUSTRATIVE SAMPLE — NOT AN ACTUAL CLIENT REPORT. The company, findings, and figures below are fictional and shown only to demonstrate the finished deliverable.

64

out of 100

Technology Health Score

Status: **Needs Attention**

Prepared for **Ridgeline Supply Co.** · Oklahoma City, OK

Assessment level: Launch / Basic · Date: August 10, 2026

Executive Summary

Ridgeline Supply Co. is a fictional 45-employee wholesale distribution business used to illustrate a completed Technology Health Assessment. The company operates one warehouse and a small office, relies on Microsoft 365, a legacy inventory system, and several outsourced vendors, and has no dedicated internal IT leadership.

The overall Technology Health Score of 64 / 100 reflects a business that functions day to day but carries meaningful, avoidable risk. Backups exist but have never been restore-tested, former-employee access has not been consistently removed, and roughly \$1,100 per month of software spend maps to licenses no one is using. At the same time, several practical opportunities — consolidating order intake, automating invoice matching, and renegotiating an internet contract — could recover both time and money within 90 days.

The pages that follow show category-level scores, the top five risks and opportunities, and a prioritized action plan across the next 30 days, 90 days, and 12 months. Every finding is written so an owner or leadership team can act on it without translating technical language.

Category Scores

Category	Score	Observation
Cybersecurity & access	52 / 100	Multi-factor authentication is enabled for email but not for the finance application. Two former employees still had active accounts at the time of review.
Backup & recovery	48 / 100	Nightly cloud backups run successfully, but a restore has never been tested and no one owns the recovery process.
Microsoft 365	66 / 100	Licensing is broadly correct, but administrator access is shared through one account with a reused password.



Network & infrastructure	70 / 100	The warehouse network is stable; the office firewall is past end-of-support and no longer receives security updates.
Hardware lifecycle	68 / 100	Twelve of thirty workstations are more than six years old and are the top source of help requests.
Software spend & vendors	55 / 100	Fourteen unused licenses and two overlapping tools account for roughly \$13,000 per year in avoidable spend.
Manual processes	58 / 100	Order intake is re-typed into three systems; invoice matching is fully manual and consumes about 20 staff hours per week.
Documentation & continuity	60 / 100	Vendor contacts, passwords, and renewal dates live with individual employees rather than in a shared, controlled location.

Top Risks

- 1. Untested backups (High).** Backups run nightly, but a restore has never been verified. If the inventory database were corrupted or encrypted by ransomware, recovery time — and whether recovery is even possible — is unknown. A failed recovery could halt shipping for days.
- 2. Former-employee access (High).** Two departed employees retained working credentials to email and the order system. This is a common entry point for data theft and fraud, and it is inexpensive to fix.
- 3. End-of-support firewall (High).** The office firewall no longer receives security updates, leaving a known, unpatchable gap between the internet and business systems.
- 4. Shared administrator account (Medium).** One shared admin login with a reused password controls Microsoft 365. A single compromised password would expose email, files, and user management for the whole company.
- 5. Key-person dependency (Medium).** Vendor relationships, renewal dates, and system knowledge live with one office manager. An unexpected absence would slow or stall routine technology decisions.

Top Opportunities

- 1. License cleanup (~\$13,000/year).** Remove fourteen unused licenses and consolidate two overlapping tools, then assign a quarterly license review so the waste does not return.
- 2. Single order intake (~12 hours/week).** Connect the web order form to the inventory system so customer details are entered once instead of three times, reducing errors and freeing staff time.
- 3. Automated invoice matching (~8 hours/week).** A modest automation between the accounting system and supplier invoices would remove most manual matching work.
- 4. Internet contract renegotiation (~\$250/month).** The current business internet contract is priced well above the market rate available at the same address.



5. AI-assisted quoting (exploratory). Quote preparation is a strong early candidate for AI assistance once order data is consolidated — realistic after the 90-day items are complete.

Immediate Actions

- Disable the two former-employee accounts and adopt a same-day offboarding checklist.
- Enable multi-factor authentication on the finance application and the Microsoft 365 admin account.
- Perform and document a test restore of one critical file and one database backup.
- Record vendor contacts, renewal dates, and system ownership in one shared, access-controlled document.

30-Day Recommendations

- Replace the shared administrator account with named admin accounts and unique passwords.
- Remove the fourteen unused software licenses and cancel the redundant tool.
- Schedule replacement of the end-of-support firewall with a supported model.
- Set a monthly, calendar-owned backup restore test with a named owner.

90-Day Recommendations

- Implement the order-intake integration so customer data is entered once.
- Deploy the invoice-matching automation and measure hours saved.
- Renegotiate or switch the business internet contract at renewal.
- Begin a staged workstation refresh for the twelve oldest machines, prioritized by user impact.

12-Month Recommendations

- Establish an annual technology budget and lifecycle plan reviewed with leadership each quarter.
- Evaluate replacement options for the legacy inventory system as integrations reach their limits.
- Pilot AI-assisted quoting once order data is consolidated and reliable.
- Repeat the Technology Health Assessment to measure score improvement and reset priorities.

Estimated Business Impact

Acting on the immediate and 30-day items removes the three highest-likelihood causes of a multi-day business interruption (unrecoverable data, compromised credentials, and an unpatched perimeter) for a modest, mostly one-time cost.

The 90-day items are projected to recover approximately \$16,000 per year in direct spend (licenses, redundant tools, and internet) and roughly 20 staff hours per week of manual work — capacity worth far more than the cost of the changes. Projections use transparent assumptions from observed license counts, invoices, and staff



interviews, and should be re-validated as each item is implemented.

Scoring Methodology

Each category is scored 0–100 based on structured interview responses and the evidence made available during the review, weighted by how directly the area affects business continuity, security, cost, and staff time. 85+ is Strong, 70–84 Good, 50–69 Needs Attention, and below 50 At Risk. The overall score is a weighted average across all reviewed categories.

Risks are ranked by likelihood and business impact, not technical severity alone. Opportunities are ranked by expected benefit relative to implementation effort. All recommendations may be implemented with Silvertree, your current technology provider, or your own team.

This Assessment is a point-in-time review based on the information made available to Silvertree Solutions. It is not a penetration test, formal compliance audit, or forensic investigation. Recommendations may be implemented with Silvertree, your current technology provider, or your own team.