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FRACTIONAL IT DIRECTOR

SAMPLE REPORT · FICTIONAL ORGANISATION

IT HEALTH CHECK · SUMMARY OF FINDINGS

Example Lettings & Property Ltd

34 staff · two offices · Microsoft 365 · outsourced IT support

58/100
Real risks to address

The day-to-day IT works, and staff are generally happy with support. The risks sit underneath: data that isn't independently backed up, a support contract about to auto-renew for three years, and no plan if something serious goes wrong. None of this is unusual, and most of it can be fixed within six months for a modest budget.

Findings by area

Accounts and passwords	Improve	Multi-factor authentication on most accounts, but not on two shared mailboxes or the finance system.
Backups and recovery	Act now	Microsoft 365 data is not backed up independently. No restore has ever been tested.
Devices	Improve	6 of 34 laptops are out of support from October. Encryption is on, patching is inconsistent.
Network and Wi-Fi	Good	Broadband and Wi-Fi are adequate for current use. A 4G backup line is recommended.
Licences and spend	Improve	About 11 unused or over-specified Microsoft 365 licences, roughly £2,900 a year.
Suppliers and contracts	Act now	Support contract auto-renews in March on 3-year terms. No register of contract dates.
Policies and training	Improve	No written IT or AI use policy. Phishing training has not been run in two years.
Continuity planning	Act now	No plan for losing the office, a key supplier or the person who knows the passwords.

The three things to fix first

1. **Back up Microsoft 365 independently and test a restore.** Microsoft keeps your service running, not your data safe from deletion or ransomware. About £2 to £3 per user per month.
2. **Take control of the support contract before March.** Give notice to renegotiate now, with a clear specification of what you need. This is the biggest saving available.
3. **Write a one-page continuity plan.** Who to call, where the passwords are held, and how the business keeps trading for a week without the office.

12-month roadmap

Next 30 days

- Independent Microsoft 365 backup, with a test restore
- MFA on every account, including shared mailboxes
- Diary the support contract renewal and give notice to renegotiate

Months 2 to 3

- Remove or downgrade unused licences
- Adopt a short IT and AI use policy
- Run phishing awareness training for all staff

Months 4 to 6

- Replace the six unsupported laptops in one planned batch
- Add a 4G backup line
- Write a one-page continuity plan and test it

Months 7 to 12

- Retender or renegotiate IT support with a clear specification
- Prepare for Cyber Essentials certification
- Annual review against this report

Indicative budget

£3,200 to £4,500
one-off: laptops, 4G backup line, Cyber Essentials

£110 to £160 a month
ongoing: backup service and training platform

£2,900 a year
estimated saving from licence clean-up, before any contract savings

Figures in a real report are based on your own quotes and licence data. Every recommendation names the options, with no obligation to buy anything through me.

What you receive in a real IT Health Check

- A walk-through meeting with the owners, head or clerk, plus on-site and remote review
- This summary, written for a board, governors or full council
- A detailed appendix: device and licence registers, supplier and contract register, and evidence for each finding
- A 12-month roadmap with indicative costs, and a follow-up call to agree priorities

This is a sample. Example Lettings & Property Ltd is a fictional organisation and all findings and figures are illustrative.
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