

Avoiding Technology Nightmares

Some Practical Advice From a Technology
Consultant That Has Seen Too Much



First Edition

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Introduction

Introduction

The Internet bubble has burst. Some say it will resurge. I say that it exploded like a nuclear detonation and the radiation fall out will plague the way Americans do business for the next 10 years.

Gone are the heady days of CEO's diving into the CIO's office and demanding the implementation of new, off the wall technologies regardless of financial considerations. Forever past are the halcyon days when IT could absorb 50% of the annual budget without even a burp. We have entered a brave new world where the technology gurus of yesterday are serving café latte in Starbucks.

I say good riddance to all that rubbish and utter nonsense. It is about time that the business world woke up. The fact is that the surest route to disaster is to spend uproariously on information technology. Once heralded as the cure-all for every business sorrow, information technology has largely succeeded in generating a new and improved generation of headaches hitherto unimagined. Never before in history has senior management been awoken at 3AM because a hacker penetrated the extranet and managed to place an order for 1 billion widgets at below cost.

Wasn't all this technology supposed to make us more productive? Wasn't it supposed to help us do such an efficient job that we could pack 20 hours worth of work into 7 allowing us to go home an hour earlier to spend more time with our families? Didn't the pundits of the latest and greatest promise to fulfill all our needs, solve all our problems, minimize our stress, and guarantee our happiness all for the low, low price of...

Do you doubt it? Do you genuinely believe you are more productive? When was the last time you checked your email and there wasn't at least one joke, advertisement or other such waste of time waiting for your attention? When was the last time you performed a search on an internet search engine and you found what you wanted on the first try? How often have you been delayed because "the computers are down?"

Today's executives are drowning in an endless sea of junk. I know one CEO who answers all his email between 3 and 5 in the morning! On an average day he receives about 10,000 messages, of which I can attest at least 90% is junk mail. You do the math. That is a ton of junk, and an immense waste of time. We are overloaded with information and the vast majority is garbage.

The first step in solving a problem comes by identifying it. I have spent enough time working on other people's technology problems that I have managed to narrow the cause down to two roots:

- 1) overspending on unnecessary technology, or
- 2) under spending on vital technology.

Chapter 1

1.0 Reality Check

It amazes me how few companies actually take the time to think technology decisions through. I find this especially true with entrepreneurs who are accustomed to flying by the seat of their pants.

You must accept the fact that any sizeable IT project will substantially impact your business. As such you need to take your time and study every aspect of the issue. If you don't have the time to do it then make sure you delegate it to someone you trust, and that better not be the same guy who is selling it to you!

In order to make the process somewhat easier, this section gives you a series of questions that you need to answer before proceeding any further.

1.1 Will It Help or Hurt?

First and foremost ask yourself if you *really* need the new product. Remember there is a difference between *want* and *need*. Be sure that you need this new technology because the grief of the implementation may be substantial. There are always growing pains associated with change. You will inevitably have employees that hate the new system because it requires them to actually have to learn a new way of working.

Does it address a specific flaw or problem you have been experiencing? Does it fix a potential weakness? Are you genuinely in a situation where the old methods no longer work? If you cannot find another solution to the problem then a new technology may be the only fix. But have you examined all the other options? Maybe your processes are flawed instead of your systems?

Will it help to save your business money? Will it help to make your business earn more money? There is one foolproof way for a business to make more money without increasing sales: save money on operations. If this new technology investment is supposed to save your company money make sure you demand a Return on Investment (ROI) analysis from your vendor. This simple document will explain how long it will take your business to pay back the cost of the new system just from the inherent savings.

Who will this product serve within your business? Is the department that the product serves a profit center? If the department is a profit center then you must be even more cautious with your implementation! Anything that could potentially cause these departments to stop making money can be devastating to your business. Take extra time making sure these questions are all answered when dealing with a new product for your

money making departments. Also, don't let a very vocal proponent sway your decision making, especially if they have not been thorough in their due diligence. Take time gathering your facts before making any decision, especially one that can impact your profits.

1.2 Can We Support It?

Next, ask yourself if your IT staff can support the new technology? This is a tough one. In many cases you treat your IT staff like medieval alchemists; you know they are working on something important but you don't begin to understand it.

Here's the painful truth: Most IT staffers suffer the worst cases of "Latest and Greatest-itis." In the typical IT employees mind, your technology infrastructure is his playground. Here he has an opportunity to learn and play with new systems at your expense! You flip the bill, he plays around and when the new product doesn't work he blames the product. It is usually a win-win situation for your IT staff.

With one of our clients, the president appointed one of his senior managers to deal with their growing IT problems. His solution was to hire my firm to provide strategic planning, implementation and maintenance. Even though he was paying us, he based all of his decisions on the recommendations of his neighbor's 14 year old son. This is almost as terrifying as learning when Congressmen consult with psychics and astrologers. This kid may have been incredibly knowledgeable but he suffered from Latest and Greatest-itis. If there was a new technology buzzword or product, he recommended it as the cure-all.

What happened? I spent more time convincing him of what he didn't need than working on getting the proper systems installed.

The lesson? Just because you brave the IT office, push past the tangled wires and emptied out husks of derelict computers, chances are they will lie and say "Yes!" if they suffer from the horrible disease of Latest and Greatest-itis.

Don't get defensive! I'm sure you have hired the best staff you can afford and they are true to you. Chances are they say a prayer for your continued safety and prosperity every night and they have named all their children after you.

IT staffers lie because they hate not being the expert. Their very job security is based around being an expert in their field. It takes a very secure IT staffer to admit where he is not knowledgeable. Let us be realistic. To the eternal chagrin of my mailman, I receive no less than eighteen technology magazines every month. I use these resources just to stay abreast of the new technologies being developed every day. But by no means do I consider myself an expert in these new technologies. No one person can know everything.

1.3 Do They Support It?

Does the manufacturer offer technical support? How much and for how long? How much does it cost if you need to speak to a human being? How long does it take to get an answer? Can they send someone to your site to fix the problem? How much does that cost? Are you required to buy a support contract? What are the terms for support contracts? How much do they cost?

Be very wary. Most companies will charge you an arm and a leg for a product then provide horrible support. Check out what other business are saying. The wonder of the internet is that now everyone has a voice. Most unhappy customers will find some place to voice their displeasure. Do some research into what other customers are saying and you might be surprised.

1.4 Can We Handle It?

Now determine if your infrastructure can handle the new product. This is easy. You can get all types of System Requirement information from company web sites. Be sure to check all the systems that will need to work with this product from compliance with the requirements. There is nothing more distressing then spending \$100,000 on new accounting software only to learn that you have to spend an additional \$40,000 for new servers that can run it.

When reading System Requirements, look at the Recommended part. Ignore the section labeled Minimum Requirements. This usually translates to the absolutely bare minimum requirements for the product to run in such a slow and painful manner that your staff will be jumping out of windows to escape. This is always true when you are talking about software. Mark it down as an immutable law of the universe.

If your infrastructure cannot handle the new product how much will it cost to upgrade? Will the upgrade affect any other systems? If so, how much will it cost to upgrade those other systems? How long will it take to upgrade? Will the upgrade lead to a loss of business or productivity? How much and at what cost?

Never underestimate the dangers of upgrading your infrastructure. This is the heart and soul of your entire information technology investment. If this fails then it all fails. This is not meant to frighten you into inaction! However, you need to make sure you are working with competent and knowledgeable people with a track record of success.

1.5 Can We Learn It?

Next you have to figure out how much it will cost you to train your staff. Is training included in the purchase price? How many hours of training is included? Can your staff learn within the allotted time? (Avoid the “They better” answer to this one. Be serious.) How many employees need training? What happens if trained employees quit? How will you train future employees? How much time will they have to dedicate to training? How much productivity will be lost while they train? What about travel expenses related to training? Do you need to purchase additional training materials (books, CD-ROMs, DVDs, video tapes, etc.)? How much do you have to pay the trainer? Do you need to purchase special equipment for the training?

For some reason the last part that is examined is training. Too many businesses view training as the problem of the employee. The difficulty with that approach is that now your staff may be learning incorrect methods for working with this new product and, for example, with a new accounting system that could be a total nightmare. Spend money on training and you will always benefit.

1.6 How Long Will It Take?

Now you need to figure out how long it will take to deploy. You can usually base this on the purchase price. Generally, if you can buy it off the shelf it should take less than a day to deploy. If you buy it from a reseller who shows up at your office with presentations, slideshows, graphs, charts, literature and full color glossy photos of happy customers then chances are the product costs a small fortune and can take months to deploy. Find out the time frame for deployment. Call a local reseller for the product and drive them nuts with these questions.

If your product does require an extended deployment time frame (i.e. longer than 1 week) make sure the reseller provides you with a deployment schedule. This document is the plan for the deployment. It should include important milestones for the installation. Make sure it discusses what happens if milestones are not reached. Who bears the responsibility if the deployment is not on schedule? How much money will it cost you if the deployment runs late?

Rest assured, your deployment will run late. They always do. Always assume that the project is being run by former government employees and you will not be shocked when everything runs late. Typically we recommend that you should always mentally double whatever deployment time frame is stated by the vendor. By doubling the time frame, you will rarely need to radically alter your post-deployment business strategies.

1.7 What the Hell is Going On?

Whether you like it or not, consult an expert. If the product you are buying is impressively expensive (what they call in college business courses a “capital

expenditure”) then you should probably spend a little more and get some alternative opinions. Find a technology consulting company, do some research on them and get their opinions.

Now, here’s the hook and the guarantee that they will be honest. Tell them from the beginning that they will never, ever, under any circumstances get the sale contract for this system. They can charge you for their time but they will never make a penny from selling you this product you are researching.

This is a great acid test. Some consultants will outright tell you they won’t do it. Most consultants are really resellers in disguise. Usually they will offer you their services for free in exchange for a lucrative equipment contract. Don’t be fooled, these are the ultimate wolves in sheep’s clothing.

By informing them that they will not get the contract you ensure their honesty. Incidentally, a real consultant will not be upset by this offer.

1.8 What’s the Bottom Line?

The bottom line is that if you have finished all of these steps, you will have successfully done all the necessary homework. Once you have accumulated all this data you will be able to make an intelligent and informed decision.

If you are the boss at a Fortune 500 company, go ahead and delegate all the research and decision making. But as a good rule of thumb, if this new project can cause your company medium to serious economic harm, then you are a fool if you delegate all of it.

Go ahead and delegate some of the basic fact finding to others. You have hired a staff, you pay them a salary; now trust them to do their jobs properly. After all, they worship you and venerate your very existence, don’t they?

Do not put all the burden of this research on one person! This is dangerous. Make sure to spread the fact finding out among different people. This will ensure that you don’t get a completely slanted report. A new accounting software may be the solution your Accounts Receivable department has been praying for but the Sales department may not feel the same way.

And tell them that on pain of death they are to avoid jargon, techno-babble or any other word used to disguise meaning. The reports are to be in plain English that even a child can understand. Set deadlines and be firm in enforcing them.

Now, take all the findings and gather them together. Dedicate time to reading their reports and figure out questions you have on the findings. Give your questions to the applicable parties. Give them a time frame for reply.

Once you have all the facts, you can do one of two things:

- 1) make a decision and stick with it to the bloody end
- 2) panic

If you opt to make a decision then go ahead and be done with it. Whatever you decide is now based on facts, not hype. Sleep well tonight.

If you choose to panic then you have a few more options.

1.9 Panic!

Calm down. You have a few options of which I will cover two. First you can redistribute the research to other departments (i.e. give the IT staff the Accounting departments report). Let them write a report in favor or against the report issued. They must defend their answers; they can't just give unintelligible replies.

These critical report evaluations must be absolutely secret. No one can know who reviewed their work. Assure everyone that all reports are under review. This will avoid petty jealousies and other interdepartmental nonsense. Whatever you do, don't give reports to other departments with a history of conflict. This will guarantee a slanted finding.

Another option is to have your expert consultant review the department reports. Chances are they will not invoke the same kind of interdepartmental indignation. Usually what happens in these cases is your entire company dislikes the consultant since they see him as a threat to their jobs, especially the IT department. A good consultant will not care, and will actually use this fear as a means to motivate your staff to work harder.

1.10 Now What?

Now it's time to make a decision. This is why you are the boss. This is why you make the medium to big bucks. Take the bull by the horns, grab the tiger by the ears and every other cliché you can think of and make a decision.

Use the facts and figures in front of you. The first decision you need to make is if you can afford the new product. Is this expenditure a serious hit against your cash position? Consider financing options and how those will impact your bottom line. Can this product break you financially?

Now, once again, how much do you *really* need this product? Is this a vanity purchase? Are you just trying to keep up with the corporate Joneses or is this a valuable tool? Will this increase productivity within a reasonable amount of time? Can you

survive if this is a total and complete flop? Will you be able to struggle along and keep your business running in a worst case scenario?

For good or for ill, you have to decide the future of your company. That responsibility rests in your hands. And whatever you decide, sleep well tonight. If everything fails, you can always blame a lot of people.

Chapter 2

2.0 How to Spend Your Money

2.1 A Word on Budgets

This may seem like the dumbest thing you will ever hear in your life. It will seem so obvious that you want to laugh. However, you have no idea how many companies I have worked with that do not operate with budgets! While this may be acceptable for a small mom and pop operation, you have to be crazy to operate without budgets.

Your company is likely divided into some kind of departmental structure. I am not saying that this has to be a rigid structure with no flexibility, but there is likely some kind of division of labor. These labor divisions, also known as departments, should have individual budgets.

This does not mean that the department will spend 100% of the allocated budget but they should know what their financial constraints are on an annual or at least quarterly basis. Also, you need to be able to go over budget too. Flexibility is the name of the game. Microsoft has a good advertising campaign talking about the “agile business.” You need to cultivate that mentality in your company to survive in the modern economic environment.

The IT department must absolutely have budgets. Even if you refuse outright to give any other department a budget then you must give one to IT. Why? Information technology systems are constantly in need of updating and refining. These systems require monitoring, development and training. This all boils down to long-term planning.

Once your IT guys know how much money they have to work with, they are better able to plan how, when and what technologies they will be able to deploy throughout your business. If they need to run to you every time they need to buy a keyboard then all they are doing is wasting your time and their own. If you don't trust your IT guys enough to let them manage a few dollars of your money then you have a bigger problem on your hands then you could imagine.

2.2 Purveyors of Fine Quality Junk

We have all fallen prey to that awesome salesman that convinces us that we cannot live without their new and improved gizmo or software. We spent the money, got the product, tried it and maybe we used it or maybe we threw it away. Even if we used it, we had problems with it and we got fed up with the damn fool thing. Ever order anything from one of those home shopping television stations? Then you might know what I am talking about.

We have been conditioned to believe that if something is new it must be improved. Ask anyone that bought Windows ME if they thought it was “improved?” The Recycling Bin of history is filled with glorious failures that were all touted as the solution to all problems from customer relationship management to baldness.

In this message I will give you the greatest gift you have ever received for free. Hope you use it. Recite with me: “Just because it is the latest, it does not mean it’s the greatest.” Now, say that about ten times until you believe it. Don’t scoff or laugh. I am serious. I want you to take a mental inventory of the number of times you fell for hype and spent money or time on some product that was new. Don’t limit this to just technology; include every aspect of your life from cars to hairbrushes. Be honest.

If you are like most people then the answer should surprise you. We buy an awful lot of junk in this country. That is part of what it means to be a good American! And if you buy it with a credit card, even better. Spend, spend spend! The more you spend the happier you will be.

I am just as guilty as everyone else. I remember buying a new fangled telescoping broom/mop/squeegee for the low price of \$15.95. The first time we used it the crazy thing exploded. I am not kidding! The thing exploded into 50 pieces in my hands. Another \$15.95 flushed down the toilet.

However, while this may be true for the average consumer, a business has to be much smarter. As a decision maker for your company you must make smarter choices. Don’t get sucked in by hype, marketing, public relations or word of mouth. Remember, chances are you employ the same types of tactics when you sell your product or service! You must be smarter than that if your business is to survive.

2.3 Penny Wise, Pound Foolish

Well this seems obvious. It is just a diametric opposite statement of the previous section. However it is much more complicated than that.

Marshall McLuhan, a well respected communications theorist and educator said that anxiety “...is having, in great part, the result of trying to do today’s jobs with yesterday’s tools.” That’s what it all comes down to.

In 1066, William the Conqueror was the only foreign invader to successfully conquer Great Britain. It has never been done since. In large part, he managed this incredible victory because his knight’s saddles had stirrups. That’s right! Because William’s knights had those leather strips attached to the saddle that you slip your feet into, they were able to win. Now, back in 1066 the stirrup was a pretty new invention that William managed to use successfully, but I bet there were still some hold outs that

claimed those new fangled stirrups were just a goofy fad that the kids would forget about soon.

That's part of your job as the boss. You have to figure out the difference between a trend and a fad. And don't kid yourself, if you guess wrong you will be in deep trouble. All the books in the business section of your local bookstore will invariably tell you that if you can identify a trend you are in good shape.

2.4 Trend Challenged

Now, let's face it, you might possibly be Trend Challenged. A good test is to see if you are still wearing 1980's fashions. If so, it's a safe bet you are Trend Challenged. If you are not gifted with information technology trend forecasting ESP-like powers you are not in too much trouble. All is not lost.

Like everything else on the market, technology products have an easily defined adoption curve. First the early adopters will buy the product. These are the poor souls suffering from Latest and Greatest-itis. This is the crowd that waits in line for days to get the latest copy of a software product the minute it hits the shelf.

Be warned, they are always the last to know or admit they have this debilitating and expensive disease. Interventions rarely work and you only seek to alienate these poor lost souls into a deeper capitalistic frenzy.

Here's the meat of the matter: Let those suckers take the hit. When a new product comes out resist all the hype and media hysterics and refuse to buy it. Hide your credit cards if necessary. Wait at least one month. By then all the reviews start pouring out. Forget the major magazines who have largely sold their souls to the advertisers who manufacture the product you are investigating. Look to internet based publications. There are a few gems out there that are willing to give solid product reviews. A good test is to see what they thought of Windows ME.

2.5 The Reviews Are In!

Once you have browsed the reviews you will have an idea if the product lives up to the hype. If it genuinely does survive the first blitz of scrutiny, then the second stage of the technology adoption curve will kick in and that is the power users. This is a core group of technology professionals that pick up on the new product and begin using it.

This crowd will begin to generate their own reviews. Be careful! The power users are generally the IT professionals that do not suffer from Latest and Greatest-itis. While this may be a small percentage, they are nonetheless dedicated to their chosen profession and try to avoid hype. If you can find one of these people, establish a relationship with

them immediately! Sign up for their newsletter or frequent their web site. Do whatever it takes to tap into that knowledge base. It will become invaluable to your company.

2.6 Now What?

If the power users like the product then the next step is mass market adoption. This means that even your grandmother has bought one and she is laughing at you because you have not.

When dealing with software be careful. Many of the major computer companies (i.e. Dell, Hewlett-Packard, etc.) have established relationships with the larger software companies. As part of these relationships, they have agreed to bundle software with the computer. When the software companies produce a new software product, the computer manufacturer picks it up for all their new computers. Microsoft has become a giant because of software bundling agreements.

Keep this in mind when you consider this stage of the adoption curve. Many new computer buyers get saddled with software that is absolutely substandard because of these bundling agreements.

Truthfully, if you have waited for this stage then chances are it is time to buy the product if all the reviews are positive and if it meets a specific business need.

2.7 The Engine Ain't Running

Hardware is the toughest upgrade decision. Your old system runs. It does the job but it is sooo slow. It seems like moss is growing on the processor it takes so long.

Quick reality check: Almost every one of your employees will bitch and complain that their computer is too slow. So how can you tell who is honest? Simple. Who waits for who? Does the computer wait for the employee or does the employee wait for the computer? That is the acid test for upgrading hardware. If your employee just wants a faster computer to brag about it around the coffee machine then they can wait. But if they are genuinely losing productivity because of a slow computer then its time for a change.

Another test is how often they need to reboot the machine. If the machine is getting on in years chances are it will require more restarts than a newer machine. Computer components are not built to last. Intel and other manufacturers will argue vehemently but most components are usually designed with built-in obsolescence. They *want* you to buy a new computer ever two to three years, otherwise they limit their market. So, if your employee complains that they need to reboot three time or more per day, then buy a new one.

So how do you know if these are real problems? Require your IT department to maintain a maintenance log. This can be a basic database run in Microsoft Access or FileMaker that keeps track of all support requests and problems reported by your employees. You can buy FileMaker for \$250 and MS Access for \$339. In either case, building the database is not a major task or effort, so don't let them fool you into thinking that it is. The IT guys will enter information into the database once or twice per day. I promise you they will not want to do it. Most IT staffers hate writing but force them to do it! This will allow them to document technology problems in your company. Who knows, if they manage to find trends they could even generate FAQ (Frequently Asked Questions) documents for your employees.

Now, don't throw the old computer away. Give it to the IT department to attempt to recondition or repair it. If the damaged component is removable, you have a spare machine available in case another computer suffers a catastrophic failure. This spare can be issued to an employee while they wait for repairs, or it can go to a new employee.

2.8 Donate It

If the IT staff says it is junk, then donate it. Be sure to run a disk wipe utility that will completely erase all data from the hard drive. These utilities are available on the internet and some good quality ones can be found for free. Personally, I like Eraser by Sami Tolvanen (<http://www.tolvanen.com>). It is easy to use, and free. This will make sure that someone doesn't retrieve your deleted files from the hard drive.

Please note if you leave any software on the computer that you donate you are giving up your license to that product. Be aware that if you retain a copy of the donated software you can be held liable for software piracy. That is a headache best avoided under all circumstances.

There are numerous resources in your local area for donating used computer equipment. Look in the phone book or consult the internet for local donating facilities.

2.9 What Do You Mean It Won't Work?

Do not ever try to install a Ferrari engine into a Volkswagen. This will frustrate you and waste a beautiful engine. By the same token it is not always possible to install new software that has passed your rigorous examination onto your antique computers.

This is another problem you may be forced to address. New software is designed to work with new computers. Operating systems are notorious for this requirement. If you find that you are seriously limited in your purchasing decisions because of your computer hardware then an upgrade may be in your immediate future.

2.10 Shell Out the Bucks Wisely

“Match the word to the action and the action to the word.” Shakespeare gives good acting advice, but if you twist it a bit, you can easily see how it applies to technology. Suit the equipment to the user.

If the person you are buying a new computer for is primarily dedicated to typing and basic data entry then it is a smart bet that they do not need the fastest and newest equipment on the market today. Suit the equipment to their needs, not to their misplaced desire for technological status.

Generally, artists and marketing staff are the worst. They will always want the newest toy available and they are adept at convincing you they need it. Let’s face it, if they weren’t good at promoting and convincing, chances are they wouldn’t be in your marketing department. Salespeople also can be tricky manipulators that use their selling powers for evil.

Here is a good rule of thumb. Artists need good equipment that runs fast and is not prone to failure. Sales staff can live fine with older equipment if they are not called upon to do multimedia presentations. If they do multimedia presentations, spring for a good computer that is geared towards handling multimedia. If they are in house sales staff that is forbidden from meeting the customer face to face then all they need is a computer that can run whatever sales software you use.

2.11 Executive Toys

You have worked hard and you deserve the best of whatever you can get. With this in mind, make sure you are not crucifying your company with silly purchases for yourself. If you genuinely need new equipment, then get it. The same tests mentioned herein should apply to how you do your work too. Forget the fact that your buddy at the golf course just bought the newest, snazziest computer on the market that not only does his job for him but could actually replace him on conference calls. Chances are he’s an idiot and you dislike him anyway so why bother trying to be like him.

I will not touch on this touchy subject any further. If you really want a new toy, go buy a board game. I like Monopoly.

2.12 So Let’s Start Spending Money

Now that you have a list of equipment that needs to be upgraded, get your credit card and run to the nearest computer store and spend, spend, spend! It will help you to avoid the pitfalls of hype and marketing and will let you get the best equipment for the money.

Conclusion

3.0 Final Thoughts

So, now you know what you need to know to run your company's technology. The best thing you can do now is let your experts do their jobs. You can drive yourself crazy micromanaging anything. Let the people you hired do their work. This is not to say you should not check up on them but don't hover over their shoulder either.

This article should help you to better understand some of the problems that businesses face. Chances are you suffer from one of the ills listed above and hopefully this will help you to cure yourself of that ill. The key to growing your business is making smart decisions. I hope this paper helps you make smarter decisions.