

IT OPERATIONS MODERNIZATION SCORECARD

**12 QUESTIONS TO MODERNIZE
YOUR IT OPERATIONS**



Business growth brings new opportunities for IT teams: more clients to support bigger projects to manage and expanding operations to coordinate. But with every step forward comes more complexity to control.

Most IT organizations don't struggle because they lack talent or tools. They struggle because their **technology, processes and people** aren't evolving together. When these three pillars move in sync, every new opportunity builds momentum instead of creating drag.

Kaseya's IT operations modernization scorecard helps you evaluate your operational maturity across technology, processes and people. By answering twelve simple questions, you'll uncover where your organization is strongest — and where better alignment could unlock greater efficiency, scalability and profitability.

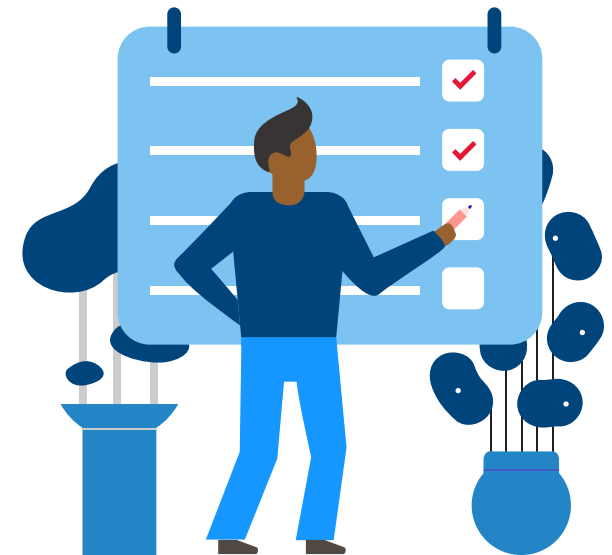
How to use this scorecard

Each assessment question is a yes/no reflection.

Yes = 1 point

No = 0 points

Add up your "Yes" answers for each section (Technology, Processes and People). Then, total those three scores to determine your overall IT operations maturity level.





PILLAR 1: Technology — Building a foundation for adaptability

According to IT Glue survey respondents, 92% of IT teams report increased efficiency and productivity after implementing an integrated PSA, RMM and IT documentation stack. When your tools are connected, you gain the visibility and control needed to scale without unnecessary complexity.

This pillar measures how well your core systems work together to support technician focus and eliminate friction.

Assessment questions	Yes (1) or No (0)
Can your technicians resolve issues without switching between multiple tools such as your PSA, RMM and documentation platforms?	
When a ticket or alert is resolved in one system, does it automatically update or close in the others, eliminating duplicate work?	
Are your dashboards truly actionable, allowing technicians to take the next step directly within the interface without seeking separate instructions?	
Are you using AI trained on your own ticket data to automate key steps in the ticket lifecycle — triage, resolution and communication — so technicians can focus on higher-value work?	
Total score for Technology	



Takeaway: When your PSA, RMM and IT documentation operate in silos, technicians lose valuable time switching between systems. Every extra step breaks their flow, slows service delivery and extends ticket resolution times, creating friction that compounds as your business grows.



PILLAR 2: Process — Turning complexity into clarity

Strong processes create consistency and control. Modern IT operations rely on systematic, documented and repeatable workflows that ensure technicians follow the same high-quality steps, no matter who's handling the work.

Assessment questions	Yes (1) or No (0)
Are your workflows automated and detailed enough to move tickets and projects forward without manual intervention?	
Do your tickets, projects and billing follow consistent, documented workflows that prevent rework and missed details?	
When work transitions between teams, does all client context transfer automatically so nothing gets lost along the way?	
Are tickets and projects automatically linked to billing so that every hour of work is fully captured and accounted for?	
Total score for Process	



Takeaway: When processes are clearly defined and automated, your operation runs with precision. Each task is completed the same way every time, reducing delays, avoiding rework and ensuring every client experience meets the same high standard.



PILLAR 3: People — empowering performance through clarity

Even the best tools and processes depend on people to bring them to life. Empowered teams are confident, proactive and customer-focused because they have access to the right information and trust in the systems behind them. When technicians have context at their fingertips, they can focus on delivering exceptional services instead of managing complexity.

Assessment questions	Yes (1) or No (0)
Do your technicians have visibility into escalated tickets so they can learn how complex issues were resolved and prevent repeat escalations?	
Can every technician access critical client information (history, nuances and service details) in one place so they can act with full context from the start?	
When new technicians join, can they quickly learn from past work and deliver at the same standard as experienced staff?	
For every issue resolved, can all technicians easily follow the same proven process to achieve consistent results?	
Total score for People	



Takeaway: Empowerment comes from visibility and trust. When people know where to find answers and how their work connects to outcomes, scaling becomes second nature.



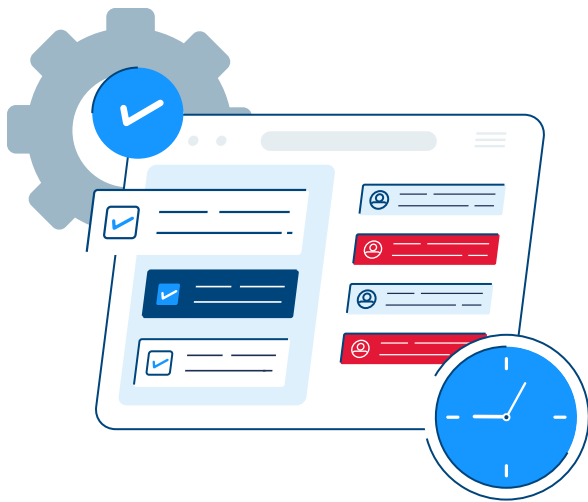
Kaseya's IT operations modernization scorecard

Use the table scorecard to record your scores for each pillar, then total them to see where your organization stands today.

Pillar	Your Score (0-4)
Technology	
Process	
People	
Total	

Total score key:

Total score	Modernization	Description
0-4	Building your foundation	Your operations are developing. Visibility and consistency are still taking shape across systems and teams.
5-8	Gaining traction	You have a solid structure in place and are beginning to align your tools, processes and people effectively.
9-12	Modernized and evolving	Your organization operates efficiently and adapts quickly, ready to scale and innovate with confidence.



Deep dive: What your scores reveal

Every IT team's modernization journey looks a little different. Use this guide to understand what your results reveal — whether one area needs more attention or your overall maturity is well-balanced.

If your lowest score is...	What it means	Next step
Technology	Tools may not be fully integrated, limiting visibility and slowing decisions.	Unify your PSA, RMM and documentation platforms to create one connected ecosystem.
Process	Workflows may be inconsistent or overly manual, creating rework and confusion.	Standardize and document your core processes before automating.
People	Teams may lack clarity or shared visibility into systems and expectations.	Strengthen enablement and documentation to empower faster, consistent delivery.
All scores are similar	You have balance but may be plateauing in improvement.	Use your strongest pillar as a model to lift the others.
One score is significantly higher	One area may be overcompensating for weaker systems elsewhere.	Strengthen your lowest pillar to restore balance and alignment.

Tip: Modernization isn't about perfection, it's about *alignment*. Your weakest pillar shows where small changes will unlock the biggest gains.



Your next level of success starts with alignment

It's easy to get caught up in the day-to-day of running an IT business. But when your tools, workflows and people are connected, your entire operation runs more smoothly. That's what modernization is really about — working smarter and giving your team what they need to do their best work.

With Autotask PSA, that kind of alignment comes built in. It brings ticketing, billing and projects together in one platform, with automation and AI that simplify work and keep your operations moving seamlessly.

See how Autotask can make your operations simpler and more efficient by [booking a demo today.](#)



The logo features the word "Autotask" in a bold, white, sans-serif font. A red checkmark is positioned to the left of the letter 'A', with its top-left corner overlapping the top of the 'A'. A registered trademark symbol (®) is located at the end of the word. The background is a dark blue field with a pattern of thin, light blue diagonal lines. A horizontal gradient bar at the top and bottom of the image transitions from blue to red.

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