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Is Your Cloud System a Mess? Our Self-Assessment Tool Will Tell You

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As I discussed in last week's article, [cloud computing systems](#) and the data they contain are now valuable corporate assets. You can't take them for granted, either: They need to be managed and cultivated like any other corporate asset.

Although it's difficult to provide an assessment tool for every kind of cloud platform or application, you can tailor the following framework to the specific cloud services in your organization. Each question below gives you points. Like in golf, low scores win—the higher your total, the more you need to develop a get-well plan.

Cloud Security

Give yourself 5 points for each "No" answer.

- Do you back up all data weekly?
- Are system audit trails turned on?
- Do you back up all metadata and administrative logs monthly?
- Are password-strength policies in place? This includes forcing password change on a quarterly basis.
- Is a document retention/destruction policy in place, and is there some sort of enforcement?
- Do you have data entry guidelines, particularly for personal confidential information. Again, is there some form of enforcement?
- Do you have active user accounts in the system for people who no longer work for your organization? (Here, give yourself 5 points if you say "Yes.")

Analysis: [Security in the Cloud Is All About Visibility and Control](#)

Cloud Data Bogosity

Give yourself 1 point for each percentage point below.

- What percent of your address data is blank, trash or does not use [ISO-standard codes for state and country](#)?
- What percent of your addresses have state and country values that are not ISO-standard codes?
- What percent of your records or documents seem to be duplicates?
- What percent of your nonarchived records or documents haven't been updated in the last year?
- What percent of your records or files are owned by zombies, or people who are no longer system users?
- What percent of the fields in your records are empty or garbage more than 98 percent of the time?

- How many times a week does the system create an unhandled exception? If there is no code in your cloud system, how many times a week is a bogus record created by users or external data feeds?

Commentary: [How CRM Data Updates Lead to Data Corruption](#)

Alignment With Business Processes

Give yourself 1 point for each "unit" that's implied in the question.

- For the organizations that regularly use the system, how many times have they had reorganizations or major staff changes since the system was first installed?
- For the system overall, divide the number of years the system has been in place by the number of times its user guides/cheat sheets have had major revisions.
- For the average system user, divide the number of years the system has been in use by the number of times there have been significant training cycles.
- For the most important user organization, how many quarters has it been since it published a "rules of engagement" or other significant business process document?
- How many business processes, internal or external, do not have a clear SLA or process quality standard?
- How many methods do "something mysterious" that nobody really understands?
- How many times a week does an average user have to [take a business process outside the system](#) for an exception, approval, merger, reconciliation and so on?

Stewardship and Governance

Give yourself 1 point for each "unit" that's implied in the question.

- How many people have [cloud administration](#) privileges?
- How many system administrators have not taken formal admin training or certification?
- Divide the total number of reports, views and dashboards by 100.
- Divide the total number of users by 100.
- Divide the total number of tables and directories by 100.
- How many of your stores exceed the allowed capacity or quota?
- How many system objects or directory trees have no descriptive documentation about them?

Advice: [Don't Gamble Your Company's Reputation on Data Governance](#)

Cloud System Integration

Again, give yourself 1 point for each "unit" that's implied in the question.

- How many third-party products and services are integrated with your cloud solution?
- How many third-party products and services are open source or unsupported by a vendor?
- How many third-party products haven't been updated in more than 18 months?
- How many of these [integrated systems](#) share a user license in the cloud with a user or other integrated system?
- How many of the systems' formulas or workflows do processing that spans system boundaries—for example, scoring that's done partially in one cloud and partially in another?
- How many external systems are not fully internationalized for character set, currency and sorting?
- How many "integrations" are done by re-keying data or export/import cycling CSV or XLS files?
- How many unplanned outages or lost transactions did your cloud integrations experience in the last 12 months?

Proper Automation

Finally, give yourself 1 point for each "unit" that's implied in the question.

- How many months has it been since you ran all the internal test cases for your code?
- What percentage of your code is not covered by a [test method](#)?
- How many of your systems' custom-coded methods no longer execute or have no relevant

function?

- How many of your systems' custom-coded methods are longer than 100 lines of code?
- How many of your systems' methods or workflows can cause an orphan record or file?
- How many buttons on forms let the user fill out the form the wrong way or execute the business process without proper enforcement?
- How many rule-driven parts of the system produce incorrect results such as flakey routing, escalation or alerts?

Analysis: [Is Your Private Cloud Defensive or Responsive?](#)

Now, Give Your Cloud System a Tune-Up

Total the scores from each of these sections. If the overall total is less than 100, breathe a sigh of relief. If your score is above 1,000, panic now. If your score is in between, focus attention on the groups that have the highest point value.

You'll notice that these questions tend to drive the scores higher for systems that have been in production for longer periods. That's because cloud systems, like gardens, require constant tending. The longer they've been in place, the more ways they can be overgrown and weed-infested.

David Taber is the author of the new Prentice Hall book, "[Salesforce.com Secrets of Success](#)" and is the CEO of [SalesLogistix](#), a certified Salesforce.com consultancy focused on business process improvement through use of CRM systems. SalesLogistix clients are in North America, Europe, Israel and India. Taber has more than 25 years of experience in high tech, including 10 years at the VP level or above.

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