

## CONSULTATION & TECHNOLOGY ASSESSMENT

### ASSESS BEFORE YOU BUY, BUILD, OR REFRESH

Every engagement starts with understanding where you are today. NewBold's consultation and assessment process maps your current technology footprint, identifies gaps and risks, and develops a tailored strategy and action plan — whether you're planning a multi-site rollout, evaluating a technology refresh, or looking for a partner to take over support operations. No generic proposals. A plan built around your locations, your devices, and your priorities.



## THE STARTING POINT FOR EVERY ENGAGEMENT

**30+**

Years of  
Industry  
Experience

**QSR+Retail**

Warehouse +  
Healthcare

**Tailored**

Strategy &  
Action Plan

**End-to-End**

Assessment  
through  
Execution

## WHAT WE ASSESS

- Technology Footprint:** Devices deployed, where, and in what condition. POS, payment, networking, AIDC, signage, kiosks, and back-office — mapped by location and criticality
- Support Landscape:** How technology is currently supported. Who handles break/fix, help desk, depot, and field service today — and where the gaps and pain points are
- Infrastructure Readiness:** Network capacity, cabling condition, power, and site readiness for new technology deployments or refreshes
- Compliance & Security:** PCI compliance posture, payment device security, data handling practices, and regulatory exposure. All staging and imaging performed on a dedicated network, eliminating cross-contamination risk.
- Lifecycle Position:** Where your devices are in their lifecycle. What needs refreshing now, what can wait, and what's approaching end-of-life or end-of-support
- Vendor Complexity:** How many vendors are involved in your technology operations today, where ownership is fragmented, and where consolidation reduces cost and risk

## DISCOVERY & SITE ASSESSMENT

- Stakeholder interviews with IT, operations, and leadership
- Technology inventory audit across all locations
- Site surveys for infrastructure and readiness
- Current vendor and support model analysis
- Pain point identification and prioritization

## STRATEGY & RECOMMENDATIONS

- Tailored technology roadmap aligned to business goals
- Service model recommendations (TMS tier matching)
- Refresh and lifecycle planning with prioritized timelines
- Cost analysis and budget planning support
- Vendor consolidation opportunities and risk reduction

## PILOT & PROOF OF VALUE

- Scoped pilot program: 20–50 locations, 30–90 days
- Deployment pilot, help desk trial, or payment security pilot
- Measurable KPIs defined upfront for objective evaluation
- Dedicated project manager for pilot execution
- Results review and go/no-go

## TRANSITION & ONBOARDING

- Structured transition plan from incumbent vendors
- Knowledge transfer and environment documentation
- Configuration template development for standardization
- Team training and escalation path definition
- Phased rollout planning to minimize operational risk

## INDUSTRIES WE SERVE

- Quick-service and fast-casual restaurants
- National and regional retail chains
- Warehouse and distribution operations
- Healthcare facilities and networks
- Multi-site enterprises across verticals

## WHO THIS IS FOR

- CIOs and VPs of IT evaluating tech partners
- Directors of store/restaurant IT planning refreshes
- Ops leaders seeking vendor consolidation
- Franchise organizations scaling new concepts
- PE-backed companies professionalizing IT operations

## LET'S START WITH A CONVERSATION

No commitment required. Tell us about your technology challenges and we'll develop a tailored assessment and action plan.