



ENDPOINT SOLUTIONS

Technology Leadership Assessment — Delivery Report



Client: Ironline Construction

Date: June 24, 2026

Prepared by: Michael-Paul Hart, Endpoint Solutions

Confidential — prepared for Ironline Construction leadership. Not for distribution.

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OVERALL MATURITY

28**Reactive**

Combined maturity across the assessed stages.

ENGAGEMENT

Industry: Construction — Commercial General Contractor

Primary sponsor: Marcus Delgado — President & Owner

Executive summary

Ironline Construction is a growing commercial general contractor doing strong work in the field — but its technology has not kept up with the size of the business, and it is the biggest source of avoidable friction and risk. Technology is handled reactively by the office manager and whoever is closest to the problem; there is no owner, no plan, and almost no governance. The office and the field run on different tools that don't connect, project data lives on individual laptops and trucks, and there is little visibility into vendors, spend, or security.

The upside here is large: modest, well-sequenced investments would remove daily friction between the field and office, protect project and financial data that is currently exposed, and give leadership its first real view of technology cost and risk. This report lays out a practical 30-to-365-day roadmap that respects how a contractor actually works.

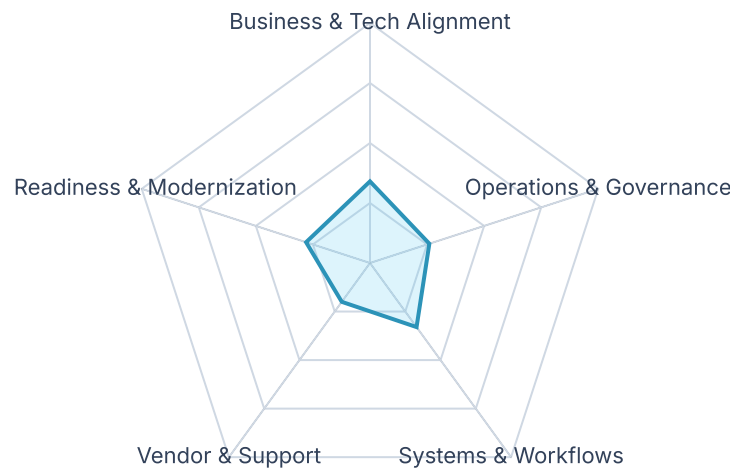
Current-state overview

Ironline runs a mix of an office-based accounting/ERP package, a recently adopted cloud project-management platform for field teams, Microsoft 365 (used mostly for email), and a lot of phones, tablets, and laptops moving between the office and job sites. There is no managed IT provider on retainer — support is call-when-broken through a couple of local contacts — and no internal technology owner. Mobile devices are largely unmanaged, project files and photos live on individual devices, security is limited to consumer antivirus and default settings, and there is no central view of what the company runs, pays for, or is exposed to. Backups are informal and unverified.

Maturity scorecard

STAGE	SCORE	INTERPRETATION
01 Business & Tech Alignment	34%	Reactive
02 Operations & Governance	26%	Reactive
03 Systems & Workflows	33%	Reactive
04 Vendor & Support	20%	Reactive
05 AI Readiness & Modernization	28%	Reactive

Maturity profile



Top findings & business implications

1. **No managed IT, no internal owner, and no governance — support is call-when-broken.** — The business has no accountable home for technology decisions, security, or incidents as it scales past 100 people.
2. **Project and financial data lives on individual laptops, trucks, and phones — largely unmanaged.** — Lost or stolen devices, or a single failure, can take project files, photos, and financial records with them, with no reliable recovery.
3. **The office ERP and the field project platform don't connect.** — Costs, changes, and schedules are re-entered by hand between field and office, causing delays, errors, and disputes.
4. **Backups are informal and have never been verified.** — A ransomware event or hardware failure could halt billing and project work with no proven recovery path.
5. **No visibility into technology vendors, spend, or security posture.** — Leadership cannot see cost, coverage, or exposure, and there is no baseline security in place across a mobile, distributed workforce.

Domain observations

01 · BUSINESS & TECH ALIGNMENT — 34%

Leadership is focused on winning and delivering work, and technology has understandably taken a back seat — but that gap is now costing the business in friction and risk. There is little visibility into how technology supports operations and low confidence in making technology decisions. A simple plan tied to growth would change the trajectory.

02 · OPERATIONS & GOVERNANCE — 26%

This is the weakest area. There is no internal or external owner for technology, no defined way decisions get made, and no leadership reporting — technology is purely reactive. For a company of this size handling contracts, payroll, and project financials, the absence of any governance is the highest-priority gap.

03 · SYSTEMS & WORKFLOWS — 33%

The recent move to a cloud project-management platform is a genuine bright spot, but it is disconnected from the office ERP, so data is re-keyed between field and office. Microsoft 365 is barely used beyond email, mobile devices are unmanaged, and project files and photos live on individual devices. Continuity is effectively absent — backups are informal and unverified.

04 · VENDOR & SUPPORT — 20%

Vendor and support management is essentially nonexistent: there is no managed IT relationship, support is ad-hoc, coverage is unclear, and there is no view of spend or renewals. Establishing a managed IT relationship and a basic vendor inventory would immediately reduce risk and downtime.

05 · AI READINESS & MODERNIZATION — 28%

AI readiness is very early. Some staff have ideas about where automation could help (bid takeoffs, reporting, scheduling), but data is scattered and unstructured and there is no policy. AI is a later-stage opportunity; the foundations — governance, security, and connected systems — come first.

Risk register

RISK	AREA	SEVERITY	OWNER
Project and financial data on unmanaged laptops, tablets, and phones	Systems & Workflows	Critical	President + Office Manager
Informal, unverified backups — no proven recovery for billing or project data	Systems & Workflows	Critical	Office Manager
No managed IT, owner, or governance for a 100+ person business	Operations & Governance	High	President
No baseline security or device management across a mobile workforce	Operations & Governance	High	President + Endpoint Solutions
No visibility into technology vendors, spend, or coverage	Vendor & Support	Medium	Finance

Recommended priorities

02 • OPERATIONS & GOVERNANCE

Establish managed IT and a technology owner

Put a managed IT relationship and an accountable internal owner in place — the foundational move that makes every other improvement possible and reduces downtime immediately.

03 • SYSTEMS & WORKFLOWS

Protect and back up project and financial data

Get project files, photos, and financial data off individual devices into managed, backed-up storage, add basic device management for the mobile fleet, and verify recovery.

03 • SYSTEMS & WORKFLOWS

Connect the field platform and the office ERP

Reduce hand re-entry of costs, changes, and schedules between the field project platform and the office ERP to cut delays, errors, and disputes.

04 • VENDOR & SUPPORT

Build a vendor, spend, and security baseline

Inventory technology vendors, cost, and coverage, and put baseline security (MFA, managed antivirus, device management) in place across the workforce.

Technology leadership roadmap

0–30 days

ACTION	OWNER	PRIORITY	EFFORT
Engage a managed IT provider and name an internal technology owner Outcome: An accountable home for technology and far less downtime · Vendor: Endpoint Solutions	President	High	Medium
Turn on MFA and stand up managed, backed-up file storage Outcome: Project and financial data protected and recoverable · Vendor: Endpoint Solutions · Depends on: IT provider engaged	Managed IT	High	Medium
Deploy basic mobile device management for field devices Outcome: Lost/stolen devices no longer expose company data · Vendor: Microsoft 365 · Depends on: IT provider engaged	Managed IT	High	Medium

31–90 days

ACTION	OWNER	PRIORITY	EFFORT
Verify backups with a full test-restore of billing and project data Outcome: Proven recovery path for the business · Vendor: Endpoint Solutions · Depends on: Storage in place	Managed IT	High	Medium
Build a technology vendor, spend, and coverage inventory Outcome: First real view of technology cost and coverage · Vendor: Endpoint Solutions	Finance	Medium	Medium
Move project files and photos off individual devices into shared storage Outcome: One reliable, searchable home for project records · Vendor: Microsoft 365 · Depends on: Storage in place	Office Manager	High	Medium

91–180 days

ACTION	OWNER	PRIORITY	EFFORT
Connect the field project platform to the office ERP Outcome: Less re-entry, fewer errors and disputes · Vendor: Software vendors · Depends on: Vendor inventory	Technology owner	Medium	High
Roll out security-awareness basics for office and field staff Outcome: Fewer successful scams and compromised accounts · Vendor: Endpoint Solutions	Managed IT	Medium	Low

181–365 days

ACTION	OWNER	PRIORITY	EFFORT
Adopt a simple technology plan and quarterly leadership review Outcome: Technology decisions tied to growth, not emergencies · Depends on: Technology owner named	President	Medium	Low

ACTION	OWNER	PRIORITY	EFFORT
Pilot automation for reporting and bid takeoffs once data is organized Outcome: Office time saved on repetitive reporting · Vendor: Endpoint Solutions · Depends on: Systems connected	Technology owner	Low	Medium

Vendor & support ecosystem

VENDOR	ROLE / COVERAGE	RENEWAL / NOTES
(No managed IT provider)	Support is ad-hoc via local contacts	None
BuildLedger ERP	Accounting, job costing & payroll	Annual 10/2026
SiteWorks PM (cloud)	Field project management & daily logs	01/2027
Microsoft 365 (Business Basic)	Email — mostly unused beyond mail	05/2027
Consumer antivirus (assorted)	Endpoint AV — inconsistent across devices	Various
Regional Wireless	Phones & mobile data for field staff	Unknown

Documentation reviewed: Software / application list · Device count / inventory · Employee count by role or location · Known projects, issues, or planned purchases

Evidence notes: No managed IT agreement, security policy, or backup documentation exists — all findings in themselves. There is no consolidated vendor or spend list. A device and application inventory should be built as a first step, since much of the environment is currently undocumented.

Renewal & contract calendar

RENEWAL	VENDOR	ROLE / COVERAGE
Annual 10/2026	BuildLedger ERP	Accounting, job costing & payroll
01/2027	SiteWorks PM (cloud)	Field project management & daily logs
05/2027	Microsoft 365 (Business Basic)	Email — mostly unused beyond mail
None	(No managed IT provider)	Support is ad-hoc via local contacts
Various	Consumer antivirus (assorted)	Endpoint AV — inconsistent across devices
Unknown	Regional Wireless	Phones & mobile data for field staff

Next steps

1. Review this report with leadership and confirm the priorities.
2. Assign owners and target dates to the roadmap actions.
3. Decide where ongoing technology advisory support is appropriate.

Appendix — discovery responses

01 · Business & Tech Alignment

Does technology clearly support your business strategy?	Somewhat
Leadership visibility into technology	Blind spots
Confidence making technology decisions	Low
Is there a technology plan tied to business goals?	Informal

02 · Operations & Governance

Is ownership of systems and risks clear?	Partly
Is IT reactive or governed?	Reactive
How are tech decisions made?	Ad-hoc
Leadership gets regular technology reporting?	Never

03 · Systems & Workflows

How much do tools or workflows slow people down?	A lot
Are core systems integrated?	Some
Microsoft 365 used to its potential?	Barely
Confidence in continuity if a key system fails	Low

04 · Vendor & Support

Is it clear who covers what for support?	Unclear
Visibility into total technology spend	None
Are vendors aligned to business needs?	No
Awareness of upcoming contracts or renewals	None

05 · AI Readiness & Modernization

Are employees using AI tools today?	Unknown
AI acceptable-use policy?	None
Identified automation opportunities?	A few ideas
Is your data ready to support AI?	Not ready

How scoring works

Each answer maps to a 0–100 maturity value based on what it signals. Stage scores are the average of the answered, scored questions in that stage; the overall score is the average of assessed stages. Some questions are informational context and are not scored. Bands: Strategic 80+ · Governed 60+ · Developing 40+ · Reactive 20+ · Ad-hoc 0+.

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