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CJI SYSTEMS PRESENTS

# The Technology Clarity Guide

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What a clear, aligned IT strategy should look like  
for your 20–80 person professional services firm.

*For NZ accounting, legal, financial services and other  
compliance-driven firms ready to lead with confidence.*

# Why Most NZ Professional Services Firms Are Carrying Technology Risk They Don't Know About

Most business leaders in professional services are sharp, commercially capable, and respected by their clients. But when it comes to technology, there's often a quiet, uncomfortable truth: your IT has grown organically, no one ever sat down and designed it — and the messy result is carrying real risk into your business every day.

## The Invisible Risk

Unlike financial or legal risk, technology risk is largely invisible — until it isn't. You don't see it on a balance sheet. Your MSP doesn't flag it in their monthly report. It shows up instead as:

- A staff member storing client files on their personal laptop
- Software your team relies on that hasn't been updated in years
- No documented plan for what happens if your systems go down
- A vendor relationship managed by one person who has since left
- Compliance obligations you're not confident you're meeting

*"We have IT support — surely that covers it?" Most IT support is reactive. It fixes what breaks. It does not protect you from what hasn't broken yet — or tell you what you should be doing differently.*

## The Strategic Gap

What NZ professional services firms almost universally lack is not IT support — it's IT leadership. Someone who understands your business goals and ensures your technology is deliberately built to support them. That gap is where most of the risk lives.

# The Five Signs Your Technology Needs Strategic Attention

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You don't need to be technical to recognise these patterns. If any of the following are familiar, your technology needs more than support — it needs leadership.

## 1 You make technology decisions without a clear framework

You're choosing software, renewing contracts, or approving IT spend based on what the vendor says, what your office manager recommends, or gut feel — not a documented strategy aligned to your business goals.

## 2 Your IT support is reactive, not strategic

Your MSP fixes things when they break and handles helpdesk requests. They don't attend your leadership meetings, challenge your current setup, or present you with a roadmap. You are not getting CTO-level thinking.

## 3 You have compliance obligations but no clear technology posture

Whether it's the Privacy Act 2020, FMA requirements, RBNZ obligations, or Civil Aviation Authority standards — if you can't confidently describe how your technology meets those obligations, you have exposure.

## 4 Your team works around your systems rather than with them

Duplicate data entry, manual workarounds, important information saved to desktop folders, inconsistent use of the tools you're paying for. This is productivity loss and risk — both at once.

## 5 You'd struggle to answer a client or auditor's technology questions

If a major client, an auditor, or a potential acquirer asked: 'How do you handle our data securely?' — could you answer confidently and completely? If not, your technology posture isn't where it needs to be.

## What 'Technology Strategy' Actually Means for a 20–80 Person Firm

Technology strategy sounds like something for large corporates with IT departments. It's not. For a 20–80 person firm, it's simply this: making deliberate decisions about technology that are aligned to where your business is going — and documenting them.

### What it includes:

- A current-state picture — what systems you have, how they connect, who owns them, and what risks they carry
- A target state — what your technology should look like in 12–24 months to support your business goals
- A prioritised roadmap — the specific steps to get from here to there, with owners and timelines
- Governance — who makes technology decisions, how vendors are managed, and how technology is reviewed
- Compliance alignment — evidence that your technology meets your legal and regulatory obligations

### What it is not:

- A list of software subscriptions
- Your MSP's service contract
- Whatever the last IT person set up
- A vague intention to 'modernise eventually'

*Technology strategy is not about having the latest tools. It's about having the right tools, deployed deliberately, aligned to your business — and someone accountable for keeping it that way.*

## The Compliance Exposure Most Firms Miss

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NZ professional services firms operate under some of the most demanding compliance environments in the country. Most understand their professional obligations — but many underestimate how deeply technology is now woven into compliance.

### **Privacy Act 2020**

Governs how you collect, store, use, and share personal information. Technology obligations include: data retention policies, access controls, breach response capability, and vendor due diligence for any third party handling your client data.

### **Financial Markets Authority (FMA)**

For financial services firms, technology systems that handle client data, advice records, or transaction information are subject to FMA oversight. Inadequate record-keeping or data governance is a direct compliance risk.

### **Reserve Bank of NZ (RBNZ)**

Regulated financial entities must demonstrate operational resilience — including business continuity, cyber risk management, and third-party vendor risk. Technology is central to each of these.

### **Civil Aviation Authority (CAA)**

Aviation-adjacent firms face strict requirements around operational data, system reliability, and documentation. Technology failure is not just a business problem — it can be a safety and regulatory one.

*The question is not whether you have compliance obligations. It's whether your technology can demonstrate that you're meeting them — before someone asks.*

# The Difference Between IT Support and Technology Leadership

This is the distinction most firms miss — and it's the one that matters most.

IT Support (MSP)	Technology Leadership (Fractional CTO)
Fixes what breaks	Ensures the right things are built in the first place
Responds to tickets	Attends leadership meetings and drives the technology agenda
Manages devices and software licences	Manages vendor relationships and procurement strategy
Reports on what happened	Advises on what should happen next
Charges by the hour or ticket	Provides ongoing strategic oversight for a predictable monthly fee
Accountable for uptime	Accountable for technology outcomes and business alignment

Most NZ professional services firms already have good IT support. What they're missing is the strategic layer above it — someone who knows their industry, understands their compliance obligations, and takes ownership of where the technology is going.

## What a Technology Roadmap Looks Like

A technology roadmap is a living document — not a one-off project. It gives your leadership team a clear picture of where your technology is today, where it needs to get to, and how you'll get there.

### 1 Current State Assessment

An honest audit of what you have. Every system, how they connect, who owns them, their age and health, what data they hold, and what risks they carry. Most firms find surprises in this step.

### 2 Target State Definition

A description of what your technology should look like in 12–24 months — aligned to your business goals, your compliance obligations, and the team you're building. Not aspirational. Specific.

### 3 Gap Analysis

The honest gap between where you are and where you need to be. Not everything — the meaningful gaps that carry cost, risk, or drag on your business.

### 4 Prioritised Initiatives

A sequenced list of what to do, why, in what order, with rough costs and owners. Not a wish list — a realistic plan your leadership team can execute against.

### 5 Governance Framework

Who makes technology decisions. How vendors are selected and managed. When the roadmap is reviewed. How technology performance is measured. Without governance, the roadmap decays.

*A roadmap is not a document you file away. It's the reference point for every technology decision your business makes — and it should be reviewed at least quarterly.*

## Building a Technology-Capable Team

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Your technology is only as effective as the people using and governing it. Most firms invest in software — few invest in building the capability around it.

### **What technology capability looks like in practice:**

- Clear ownership — every system has an internal owner responsible for it, not just the vendor
- Documented processes — how your team onboards and offboards staff from systems, handles data, and responds to incidents
- Technology confidence — staff who know how to use your tools well, not just adequately
- Security hygiene — password management, MFA, phishing awareness — embedded in how your team works, not just a one-off training
- Escalation clarity — everyone knows what to do (and who to call) when something goes wrong

### **The leadership layer:**

At the leadership level, technology capability means having someone — internal or fractional — who can speak confidently to your board, your auditors, and your enterprise clients about your technology posture. Not because they memorised a script, but because they own the strategy and can account for every decision.

# How to Evaluate Technology Vendors Without Being a Technical Expert

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You don't need to be technical to make good technology vendor decisions. You need the right questions — and someone in your corner who has seen how these decisions play out.

## **Ask every vendor these questions:**

### **1 Who are your reference clients in our industry?**

Regulated industry experience is not optional. A vendor who hasn't worked in your compliance environment will create problems they don't anticipate.

### **2 How is our data stored, accessed, and protected?**

Where does it sit (NZ vs offshore)? Who can access it? What happens in a breach? These are not technical questions — they are business and legal questions.

### **3 What does your exit process look like?**

If you leave, can you take your data? In what format? How long does it take? Vendors who make this hard are not acting in your interest.

### **4 What is your uptime guarantee and how is it enforced?**

SLAs are only valuable if there's a mechanism when they're breached. Get the specifics in writing.

### **5 What does your support model look like at 5pm on a Friday?**

When your team is working late before a client deadline, is your vendor available? Know the real answer before you sign.

# A Checklist: Is Your Technology Posture Audit-Ready?

Use this checklist to assess where your firm stands today. If you can answer yes to every item, your technology posture is strong. Each 'no' or 'unsure' is a risk worth understanding.

## GOVERNANCE & STRATEGY

- We have a documented technology strategy reviewed in the last 12 months
- Technology decisions are made against a defined roadmap, not ad hoc
- We have a named owner for every critical business system
- Our leadership team can describe our technology posture at a high level

## DATA & PRIVACY

- We know exactly what personal data we hold, where it is, and who can access it
- We have a documented data breach response process
- Our vendors have been assessed for data handling compliance
- We conduct regular data access reviews (who has access to what)

## SECURITY & RESILIENCE

- All staff use MFA on critical business systems
- We have a tested backup and recovery process
- We have a documented business continuity plan covering technology failure
- We conduct regular security awareness training

## VENDOR & CONTRACTS

- We have current contracts with all major technology vendors

- We know what data each vendor holds on our behalf
- We have reviewed our exit rights with critical vendors
- Vendor performance is reviewed at least annually

## COMPLIANCE

- We can demonstrate compliance with the Privacy Act 2020 through documented controls
- Our industry-specific obligations (FMA / RBNZ / CAA / other) are reflected in our technology practices
- We have documented evidence of compliance we could provide to an auditor
- Our compliance posture has been reviewed by someone with technical and regulatory knowledge

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## You've seen what a clear technology strategy looks like. Now let's build yours.

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CJI Systems acts as your outsourced CTO — taking ownership of your technology strategy and guiding every major decision as your business grows. We don't arrive needing to learn your industry. We bring hands-on experience from NZ's most compliance-demanding sectors: financial services, aviation, telco, and media.

### Here's how to get started:

#### 1 Schedule a Strategy Call

A focused conversation to understand your current technology landscape, your goals, and where the gaps are. No sales pitch. Just clarity.

#### 2 Get a Clear Technology Roadmap

A documented roadmap showing your current state, your target state, and a prioritised plan to get there.

#### 3 Ongoing CTO Guidance & Oversight

Strategic technology leadership, every step of the way.

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## Schedule your Strategy Call today.

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