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5 Year Technology Roadmap Checklist

When optimizing your technology infrastructure, knowing where to start and what to look for can be difficult. That's why we created the 5 Year Technology Roadmap Checklist.

Whether you're a client, prospect, or the "office IT person", now's the time to ensure that your organization will thrive for years. You can thoughtfully design and implement a strategic technology roadmap by utilizing the following checklist.

DISCOVER

Identify all devices, systems, software, and platforms currently in use.

☐ **Network discovery**

- Identify all technology assets connecting to your network—routers, firewalls, switches, wireless, servers, printers, endpoints, on-premises software, cloud software, cloud architectures or services, etc.

☐ **Physical audit**

- Perform an onsite review of all key technology areas, including network closets, telecommunications closets, core data centers, wiring racks, systems racks, facilities access control, and facilities video surveillance.

- (**pro tip:** *take pictures and organize them based on facility address and office space*)

☐ **End-of-life analysis**

- Start your end-of-life (EOL) analyses by researching and verifying the dates when manufacturers will no longer support certain assets.

- EOLs also allow you to identify systems that a manufacturer might be intentionally retiring (which is hugely important considering you may assume risk by choosing not to upgrade or replace them).

☐ **Review subscriptions, maintenance contracts, vendor support, and cloud services**

- Verify which assets require subscriptions, maintenance contracts, vendor support, and cloud services—make note of their unique documentation, account numbers, and contact information.

ASSESS

Uncover departmental pain points (as well as new interests!) where technology is used or can be improved.

☐ **Meet with key stakeholders**

- Identify individuals who are instrumental in leading and managing your organization—their involvement is critical to executing the technology roadmap to best understand, validate, and support overall planning.

☐ **Understand operational deficiencies**

- Ask the key stakeholders to identify challenges they see within their departments (specific to operations)—look to relate specific technologies in place that may be preventing or limiting their efficiency today.

☐ **Discuss vendor recommendations**

- As you expose operational deficiencies, engage with manufacturers and vendors that support the technology tools that you're utilizing to improve performance.

- Ask for their recommendations on improving efficiency.

☐ **Develop a wish list**

- Removing all obstacles, is there anything different you would choose to implement?

- Individual departments should then discuss their lists to foster new ideas that may result in a new (and better!) approach.

STRATEGIZE

Recognize industry trends, new initiatives, and compliance pressures.

☐ **Evaluate immediate changes specific to your organization and industry**

- Include key stakeholders in plans that impact how you'll use technology in the future.

☐ **Influences driven by demand**

- Be aware that clients may demand a new service from your organization following new trends within your industry.

☐ **Security posture**

- Broaden the discussions to include topics surrounding regulatory compliance, insurance, and cybersecurity—this may result in new initiatives, technologies, and projects to plan (and budget).

☐ **Measure and prioritize impact**

- Once you identify your new initiatives, your leadership team must determine the time it'll take to accomplish them and their priority level.

FORECAST

Create an annual budget.

☐ **Define operating and capital expense structure**

- Separate these expenses when forecasting.

- Operating expenses are typically monthly or yearly. The same is true for capital expenses, but these costs are specific to strategic projects.

- A strategic project may include replacing or upgrading existing technologies or introducing a new initiative (as well as new costs).

☐ **Organize by service, maintenance, and project expense**

- Consider the three key areas within your budgeting document
  - **Service**: includes vendor contract services
  - **Maintenance**: includes monthly and/or annual manufacturers' renewals
  - **Projects**: include new initiatives

☐ **Set baseline, then forecast**

- Set the first-year template and then repeat it for the next four years, adjusting where necessary. Reference dates (such as manufacturer renewals) within each line item. Summarize annual totals for operating, capital, and the total of both.

☐ **Budget by priority**

- Review and revise annual plans, update, and adjust the budget throughout the forecasting document.

REPEAT

Perform year after year, aligning with your fiscal planning.

☐ **Follow the same process and documentation**

- Some years may require more effort than others—update your processes and documentation as they evolve.

☐ **Review prior years' accomplishments**

- Account for services, maintenance and project initiatives that were (and weren't) processed.

☐ **Update and adjust forecast**

- Update your five-year budgeting and forecasting document. When adding new assets or initiatives, you may need to adjust future years of your roadmap and related projects to meet your fiscal objectives.

☐ **Strive for annual expense consistency**

- The goal is to establish a more consistent and dependable yearly budget. By continually reexamining and refreshing your technologies, it's more likely that some years will have fewer capital projects (i.e., less spend).
- Within your annual forecast, allocate allowances (i.e., savings) to fund future projects.

In order to effectively complete the entire (or even parts!) of this checklist, your organization may need to utilize companies with expertise in these areas.

When the time comes to pick vendors, it's crucial to keep in mind that these companies become your partners that are critical to your business.

GET STARTED

Let's talk about your business needs:

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