

Annual Technology Roadmap

IT Strategy & Infrastructure

Evaluation	Yes	No	Needs Review	Priority (Low, Medium, High)	Owner	Action Item
Does our current IT strategy explicitly support next year's business goals and projected growth?						
Can our existing servers support future business demands?						
Can our network infrastructure support future business demands?						
Can our cloud environment support future business demands?						
Can our end-user devices support future business demands?						
Do we need a hardware refresh plan for aging servers, workstations, network equipment, or devices?						
Have backup systems been tested under real-world recovery scenarios?						
Have disaster recovery procedures been tested under real-world recovery scenarios?						
Have business continuity plans been reviewed and tested?						
Are we paying for software licenses we no longer use?						
Are we paying for cloud subscriptions we no longer use?						

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Are we paying for vendor contracts that no longer deliver clear business value?						
Are there opportunities to consolidate vendors to reduce technology costs without sacrificing performance?						
Are IT investments clearly connected to business outcomes such as uptime, productivity, cost reduction, or scalability?						
Are upcoming technology renewals, replacements, or upgrades included in next year's budget plan?						

Cybersecurity, Risk, & Business Continuity

Evaluation	Yes	No	Needs Review	Priority (Low, Medium, High)	Owner	Action Item
Have we completed a comprehensive cybersecurity posture assessment?						
Have we reviewed compliance alignment for relevant frameworks such as HIPAA, CMMC, or other industry requirements?						

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Cybersecurity, Risk, & Business Continuity

Evaluation	Yes	No	Needs Review	Priority (Low, Medium, High)	Owner	Action Item
Have we reviewed our current cyber insurance requirements?						
Does our cyber insurance coverage match our actual risk profile?						
Are our security awareness training programs reducing employee risk?						
Are security awareness programs reducing susceptibility to phishing?						
Have we evaluated third-party vendors that have access to sensitive business data?						
Do third-party vendors follow appropriate cybersecurity protocols?						
Do our corporate security policies reflect employee usage of generative AI tools?						
Do our corporate security policies reflect current public cloud usage?						
Have we reviewed access controls for users, administrators, vendors, and service providers?						
Have we reviewed business continuity plans through a cybersecurity lens?						
Have we reviewed incident response procedures and assigned internal responsibilities?						

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Cybersecurity, Risk, & Business Continuity

Evaluation	Yes	No	Needs Review	Priority (Low, Medium, High)	Owner	Action Item
Have we identified the highest-risk systems, users, and data repositories?						
Are cybersecurity investments prioritized based on risk reduction and business impact?						

Print Infrastructure

Evaluation	Yes	No	Needs Review	Priority (Low, Medium, High)	Owner	Action Item
Does our current printer fleet match the size of our workforce?						
Does our current printer fleet match the location and layout of our workforce?						
Does our printer fleet support our current hybrid work setup?						
Are we paying for underutilized desktop printers?						
Are we paying for underutilized copiers that are no longer necessary?						

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Print Infrastructure

Evaluation	Yes	No	Needs Review	Priority (Low, Medium, High)	Owner	Action Item
Are we paying for underutilized copiers that are no longer necessary?						
Are upcoming print lease renewals still cost-effective for projected business volume?						
Are device placements aligned with actual usage patterns by department or location?						
Are secure pull-printing and user authentication protecting confidential documents?						
Have baseline security configurations been reviewed on all print devices?						
Are print devices monitored so they do not become unmonitored network entry points?						
Are toner, paper, and supply costs aligned with expected usage?						
Are print-related workflows still relying on unnecessary paper steps?						
Are print policies documented and communicated to employees?						
Are print management tools giving us visibility into usage, cost, and security?						
Are print infrastructure decisions connected to cost reduction, security, and productivity goals?						

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Physical Security Systems

Evaluation	Yes	No	Needs Review	Priority (Low, Medium, High)	Owner	Action Item
Are facility access control systems integrated with employee onboarding procedures?						
Are facility access control systems integrated with employee offboarding procedures?						
Does our current camera layout adequately protect critical areas?						
Does our current camera layout adequately protect entrances and exits?						
Does our current camera layout adequately protect high-risk facility zones?						
Have physical alarm systems been fully tested within the past year?						
Have emergency notification procedures been fully tested within the past year?						
Does our video surveillance data retention timeframe meet current compliance requirements?						
Does our video surveillance data retention timeframe meet legal or insurance requirements?						
Are cameras approaching end of life or due for replacement?						

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Physical Security Systems

Evaluation	Yes	No	Needs Review	Priority (Low, Medium, High)	Owner	Action Item
Are badge readers approaching end of life or due for replacement?						
Are monitoring servers approaching end of life or due for replacement?						
Are physical security systems connected to IT policies and cybersecurity controls?						
Are access permissions reviewed when employees change roles?						
Are physical security investments prioritized based on risk, facility needs, and business continuity?						

Business Process Automation

Evaluation	Yes	No	Needs Review	Priority (Low, Medium, High)	Owner	Action Item
Are all core business processes clearly documented?						
Are documented processes easily accessible to employees who need them?						

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Business Process Automation

Evaluation	Yes	No	Needs Review	Priority (Low, Medium, High)	Owner	Action Item
Are we getting expected operational value from major software platforms?						
Are we getting expected ROI from automation platforms?						
Are employees consistently adopting our digital tools?						
Are workflows helping employees focus on their primary work instead of distracting them?						
Do appropriate data security controls protect automated workflows?						
Do appropriate data security controls protect data transfers?						
Does every critical business process have a clearly assigned internal owner?						
Have staffing changes orphaned any workflows or systems?						
Are departments using consistent processes, or are there unnecessary variations?						
Are approvals, handoffs, and notifications automated where appropriate?						
Are employees entering the same data into multiple systems?						

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Business Process Automation

Evaluation	Yes	No	Needs Review	Priority (Low, Medium, High)	Owner	Action Item
Are legacy workflows creating delays, errors, or unnecessary administrative effort?						
Are automation opportunities prioritized based on productivity, cost reduction, and employee experience?						