IT Strategy Template

3-year IT strategy aligned with business goals. Use this template to create a structured technology plan that drives business value, manages risk, and controls costs.

3yr	5	Align	Free
STRATEGIC HORIZON	STRATEGY PILLARS	IT TO BUSINESS GOALS	STRATEGY TEMPLATE

How to Use This Template

Complete this template with input from business leadership and IT stakeholders. The IT strategy should be reviewed and updated annually. It serves as the guiding document for all technology decisions, investments, and priorities.

1 Executive Summary & Vision

Articulate the role of technology in achieving business objectives.

Organisation: .....

Strategy Period: .....

Prepared By: .....

Approved By: .....

Date: .....

IT Vision Statement

Describe in 2–3 sentences what the IT function will deliver for the business over the strategy period. The vision should be aspirational but achievable.

Notes

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Strategic Alignment

Map each business objective to the IT capabilities required to support it.

BUSINESS OBJECTIVE	IT CAPABILITY REQUIRED	CURRENT GAP	PRIORITY
			H / M / L
			H / M / L
			H / M / L
			H / M / L
			H / M / L

2 Current State Assessment

Document the current IT environment, strengths, and weaknesses.

Infrastructure Summary

Cloud Services: .....

On-Premise Systems: .....

Network (Sites/Connectivity): .....

End-User Devices: .....

Annual IT Spend: .....

Strengths

- ✓ Strong cloud email with Microsoft 365
- ✓ Reliable internet connectivity
- ✓ Good end-user device refresh cycle
- ✓ Responsive IT helpdesk

Weaknesses

- ✗ No documented disaster recovery plan
- ✗ Aging on-premise server infrastructure
- ✗ Limited cybersecurity measures
- ✗ No formal IT strategy or governance

Maturity Assessment

Rate your IT maturity across key areas: Infrastructure (1–5), Security (1–5), Cloud Adoption (1–5), User Experience (1–5), Governance (1–5). A score of 1 is ad-hoc/reactive, 3 is managed/documented, and 5 is optimised/proactive. Use this as a baseline to measure improvement.

3 Strategic Initiatives & Roadmap

Define the major IT initiatives planned over the strategy period.

INITIATIVE	DESCRIPTION	YEAR	EST. BUDGET		
Cloud Migration	Migrate file server and applications to Azure	Year 1	£15,000–25,000	Improved resilience, remote access	IT Manager
Cybersecurity Programme	Implement Cyber Essentials Plus, EDR, SIEM	Year 1	£8,000–15,000	Risk reduction, compliance	IT Manager
DR & Business Continuity	Design and test disaster recovery plan	Year 1–2	£5,000–10,000	Business resilience	Operations
Network Refresh	Replace aging switches and access points	Year 2	£10,000–20,000	Performance, WiFi coverage	IT Manager
Digital Workplace	Deploy Microsoft 365 advanced features, Teams, SharePoint	Year 2–3	£5,000–10,000	Productivity, collaboration	IT + HR
Data & Analytics	Implement Power BI dashboards for business data	Year 3	£5,000–10,000	Data-driven decisions	IT + Finance

Budget Governance

Each initiative should have a defined business case before budget approval. Track actual spend against budget quarterly. Maintain a contingency of 10–15% of total IT budget for unplanned requirements.

4 IT Budget & Investment Plan

Summarise the IT budget across the strategy period.

CATEGORY	YEAR 1	YEAR 2	YEAR 3
BAU IT Support (managed services)	£	£	£
Software Licences & Subscriptions	£	£	£
Hardware Refresh	£	£	£
Strategic Projects	£	£	£
Cloud Services (Azure, M365)	£	£	£
Security & Compliance	£	£	£
Contingency (10–15%)	£	£	£
TOTAL	**£**	**£**	**£**

5 Governance & Review

Define how the IT strategy will be governed, measured, and reviewed.

Strategy Owner: .....

Review Frequency: .....

Steering Committee Members: .....

Key Performance Indicators

KPI	TARGET	MEASUREMENT	REVIEW FREQUENCY
System uptime	99.9%	Monitoring data	Monthly
IT support satisfaction	≥ 4.2/5	User survey	Quarterly
Security incidents	Zero critical breaches	Incident log	Monthly
Project delivery	90% on time and budget	Project tracking	Quarterly
Budget variance	Within ±10%	Financial reporting	Quarterly

Notes

Need vCIO Strategic Guidance?
Our virtual CIO service provides senior IT leadership aligned to your business goals, without the cost of a full-time hire.

info@cloudswitched.com
New London House, 6 London St, London EC3R 7LP

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