Technology Roadmap Template

Visual roadmap for technology investments and milestones. Plan and communicate your IT journey with this structured template covering infrastructure, security, cloud, and digital workplace initiatives.

4	3yr	Visual	Free
ROADMAP QUARTERS	PLANNING HORIZON	COMMUNICATE IT PLANS	TEMPLATE RESOURCE

How to Use This Template

Complete the roadmap by plotting your planned IT initiatives across the timeline. Use this document to communicate the IT plan to business leadership and to track progress against milestones. Update quarterly.

1 Roadmap Overview

Organisation: .....

Roadmap Period: .....

Prepared By: .....

Version: .....

Last Updated: .....

The technology roadmap translates the IT strategy into a visual timeline of planned initiatives, investments, and milestones across four workstreams.

2 Year 1 — Foundation

Establish core capabilities, address critical gaps, and build the platform for future initiatives.

Q1–Q2: Critical Priorities

INITIATIVE	WORKSTREAM	MILESTONE	TARGET DATE	
Cyber Essentials Certification	Security	Certificate obtained	Q1	£2,000
Backup & DR Implementation	Infrastructure	DR plan tested	Q1	£5,000
Microsoft 365 Optimisation	Cloud	Advanced features deployed	Q2	£3,000
Network Documentation	Infrastructure	Full docs complete	Q2	£1,500
Security Awareness Training	Security	All staff trained	Q2	£1,000

Q3–Q4: Build & Improve

INITIATIVE	WORKSTREAM	MILESTONE	TARGET DATE	
Cloud Migration Phase 1	Cloud	File server migrated	Q3	£8,000
EDR Deployment	Security	All endpoints protected	Q3	£3,000
WiFi Upgrade	Infrastructure	New APs installed	Q4	£6,000
IT Policy Framework	Governance	All policies approved	Q4	£1,500

3 Year 2 — Acceleration

Build on the foundations laid in Year 1 with more transformative projects.

INITIATIVE	WORKSTREAM	MILESTONE	TARGET DATE	
Cloud Migration Phase 2	Cloud	LOB apps migrated to Azure	Q1–Q2	£15,000
Network Refresh	Infrastructure	Core switches replaced	Q1	£12,000
Cyber Essentials Plus	Security	CE+ certification obtained	Q2	£4,000
Teams Telephony	Cloud	Phone system migrated to Teams	Q3	£8,000
Power BI Dashboards	Digital Workplace	Finance dashboards live	Q3–Q4	£5,000
Zero Trust Pilot	Security	Conditional Access policies deployed	Q4	£3,000

4 Year 3 — Optimisation

Optimise, automate, and extract maximum value from technology investments.

INITIATIVE	WORKSTREAM	MILESTONE	TARGET DATE	
AI/Automation Pilots	Digital Workplace	2 business processes automated	Q1–Q2	£8,000
Full Zero Trust Architecture	Security	ZTNA deployed for all remote access	Q1–Q2	£10,000
ISO 27001 Preparation	Governance	Gap analysis complete	Q2–Q3	£12,000
Advanced Analytics	Digital Workplace	Cross-departmental dashboards	Q3–Q4	£6,000
Hardware Refresh Cycle 2	Infrastructure	All devices < 4 years old	Q4	£15,000

5 Budget Summary by Year & Workstream

WORKSTREAM	YEAR 1	YEAR 2	YEAR 3	
Infrastructure	£	£	£	£
Security	£	£	£	£
Cloud	£	£	£	£
Digital Workplace	£	£	£	£
Governance	£	£	£	£
TOTAL	**£**	**£**	**£**	**£**

Notes

Need a Technology Roadmap?
Our vCIO service builds technology roadmaps that align IT investments with your business growth plans.

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

Prepared by: _____ Date: _____ Approved by: _____

© 2026 CloudSwitched Limited. All rights reserved. This resource is provided for informational purposes and does not constitute professional IT advice.