



FREE RESOURCE — IT STRATEGY TEMPLATE

# IT Strategy Template

A 3-year IT strategy aligned to business goals. Use this template to build a structured technology plan that drives business value, manages risk and controls cost — with a clear vision, current-state assessment, initiative roadmap and three-year budget you can defend to the board.

**3yr**

STRATEGIC  
HORIZON  
COVERED

**5**

STRATEGY  
PILLARS

**Align**

IT TO BUSINESS  
GOALS

**Fillable**

TICK & TYPE  
IN ANY VIEWER

3-YEAR PLAN

BUSINESS ALIGNED

BUDGET FORECAST

BOARD-READY

PREPARED FOR

Cloudswitched Knowledge  
Library

PREPARED BY

Cloudswitched Ltd.

VERSION

2026 Edition

FORMAT

Interactive PDF

# 00

## How to use this template

An IT strategy is the bridge between what the business is trying to achieve and the technology decisions you make every quarter. Without one, IT spend drifts and the leadership team sees IT as a cost — not an enabler. Complete this template with input from **business leadership and IT stakeholders together**, then refresh it annually. This is an **interactive PDF** — tick the boxes and type into the fillable lines directly in any modern viewer.

### STRATEGY ≠ BACKLOG

A list of projects IT wants to do is not a strategy. A strategy starts with the **business objectives**, derives the **IT capabilities** needed, identifies the **gap**, and only then names the initiatives that close it. Every initiative on page 05 should trace back to a business objective on page 03 — if it doesn't, it's a wish.

### The five strategy pillars

- **01 Executive Summary & Vision** — the role of technology over the strategy period and the business objectives it must support.
- **02 Current State Assessment** — infrastructure summary, strengths, weaknesses, and a maturity score across five domains.
- **03 Strategic Initiatives & Roadmap** — the named initiatives that close the gap, sequenced across Year 1–3 with owners.
- **04 IT Budget & Investment Plan** — three-year budget broken down by category, with contingency and a clear total.
- **05 Governance & Review** — strategy owner, review cadence, steering committee and the KPIs you will be measured on.

### Who should be in the room

An IT strategy only IT writes is a backlog; one only the business writes is a wish list. Get all four roles in the room before you start filling this in.

- **Business Sponsor** (MD / FD / COO) — owns the business objectives the strategy must serve.
- **IT Lead** (head of IT or vCIO) — owns the IT capabilities and the technical plan.
- **Finance** — signs off the three-year budget envelope and the contingency.
- **Operations & function leads** — bring operational reality and confirm impact assumptions.

# 01

## Executive Summary & Vision

Articulate the role of technology in achieving business objectives over the strategy period. Keep the vision short, aspirational and achievable — if it cannot be read aloud in a board meeting in under a minute, it is too long.

### Strategy details

**Organisation** \_\_\_\_\_

**Strategy period (e.g. 2026–2028)** \_\_\_\_\_

**Prepared by** \_\_\_\_\_

**Approved by** \_\_\_\_\_

**Date approved** \_\_\_\_\_

### IT vision statement

Describe in 2–3 sentences what the IT function will deliver for the business over the strategy period.

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

### Strategic alignment matrix

Map each business objective to the IT capability required to support it, the current gap, and the priority.

BUSINESS OBJECTIVE	IT CAPABILITY REQUIRED	CURRENT GAP	PRIORITY (H/M/L)
_____	_____	_____	<input type="checkbox"/> H <input type="checkbox"/> M <input type="checkbox"/> L
_____	_____	_____	<input type="checkbox"/> H <input type="checkbox"/> M <input type="checkbox"/> L
_____	_____	_____	<input type="checkbox"/> H <input type="checkbox"/> M <input type="checkbox"/> L
_____	_____	_____	<input type="checkbox"/> H <input type="checkbox"/> M <input type="checkbox"/> L
_____	_____	_____	<input type="checkbox"/> H <input type="checkbox"/> M <input type="checkbox"/> L

# 02

## Current State Assessment

Document the current IT environment honestly. Strengths protect what already works; weaknesses inform the initiatives on page 05. Be specific — "ageing servers" is not actionable, "two physical hosts now seven years old" is.

### Infrastructure summary

Cloud services in use \_\_\_\_\_

On-premise systems \_\_\_\_\_

Network (sites / connectivity) \_\_\_\_\_

End-user devices & refresh cycle \_\_\_\_\_

Annual IT spend (current) \_\_\_\_\_

### Strengths & weaknesses

Strengths — \_\_\_\_\_

Weaknesses — \_\_\_\_\_

### Maturity assessment

1 = ad-hoc, 3 = managed / documented, 5 = optimised. Tick one box per row — your baseline to measure improvement against next year.

DOMAIN	1 Ad-hoc	2	3 Managed	4	5 Optimised
Infrastructure	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Security	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Cloud adoption	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
User experience	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Governance	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

# 03

## Strategic Initiatives & Roadmap

Name the initiatives that close the gaps identified on page 03, sequence them across Year 1–3, and put an owner against each one. Every row here should trace back to a business objective in the alignment matrix.

### Example shape (illustrative only)

INITIATIVE	DESCRIPTION	YEAR	EST. BUDGET	BUSINESS IMPACT
Cloud Migration	Migrate file server and core apps to Azure	1	£15k–25k	Resilience, remote
Cyber Programme	Cyber Essentials Plus, EDR, SIEM	1	£8k–15k	Risk, compliance
DR & BCP	Design and test disaster recovery	1–2	£5k–10k	Resilience
Network Refresh	Replace switches and access points	2	£10k–20k	Performance
Data & Analytics	Power BI dashboards across functions	3	£5k–10k	Data-driven

### Your initiative roadmap

INITIATIVE	DESCRIPTION	YEAR	EST. BUDGET	OWNER

#### BUDGET GOVERNANCE

Each initiative needs a defined business case before budget is released. Track actual spend against budget quarterly. Maintain a contingency of 10–15% of total IT budget for unplanned requirements — if you don’t reserve it, the first surprise eats Year 1.

# 04

## IT Budget & Investment Plan

Summarise the IT budget across the strategy period. Show BAU separately from strategic investment so the board can see what is the cost of running IT today versus what is being invested to change it.

### Three-year budget forecast

CATEGORY	YEAR 1	YEAR 2	YEAR 3
BAU IT support (managed services)	£ _____	£ _____	£ _____
Software licences & subscriptions	£ _____	£ _____	£ _____
Hardware refresh	£ _____	£ _____	£ _____
Strategic projects (page 04)	£ _____	£ _____	£ _____
Cloud services (Azure, M365)	£ _____	£ _____	£ _____
Security & compliance	£ _____	£ _____	£ _____
Contingency (10–15%)	£ _____	£ _____	£ _____
<b>TOTAL</b>	£ _____	£ _____	£ _____

#### READING THE BUDGET

If **BAU + cloud + security** grows year-on-year while **strategic projects** stays flat, IT is running but not transforming. A healthy SME IT budget grows strategic spend in Year 1 and Year 2 then plateaus in Year 3 as the initiatives land and shift into BAU.

### Budget notes & assumptions

---



---



---

# 05

## Governance & Review

Define how the IT strategy will be governed, measured and reviewed. A strategy without an owner and a review cadence is a one-off document — not a strategy.

### Governance owners

Strategy owner \_\_\_\_\_

Review frequency \_\_\_\_\_

Steering committee members \_\_\_\_\_

Next milestone review date \_\_\_\_\_

### Recommended KPIs

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

PREPARED BY \_\_\_\_\_

DATE \_\_\_\_\_

APPROVED BY \_\_\_\_\_

### Need vCIO strategic guidance?

Our virtual CIO service gives UK SMEs senior IT leadership aligned to business goals — board-ready strategy, three-year budget defence and quarterly review — without the cost of a full-time hire.

[info@cloudswitched.com](mailto:info@cloudswitched.com)

[cloudswitched.com/services/it-support](https://cloudswitched.com/services/it-support)



CLOUDSWITCHED

IT STRATEGY & VCIO FOR UK SMES

[info@cloudswitched.com](mailto:info@cloudswitched.com)

New London House, 6 London St  
London EC3R 7LP · United Kingdom