



FREE RESOURCE — ROADMAP TEMPLATE

Technology Roadmap Template

A visual three-year roadmap for the technology investments that move the business forward — infrastructure, security, cloud and digital workplace. Plot initiatives by quarter, log owners and budgets, mark progress against milestones, and use it as the single page your board and leadership team agree on.

3yr

PLANNING
HORIZON

12

QUARTERLY
CHECKPOINTS

4

STRATEGIC
WORKSTREAMS

Fillable

EDIT IN ANY
PDF VIEWER

INFRASTRUCTURE

SECURITY

CLOUD

DIGITAL WORKPLACE

PREPARED FOR

Cloudswitched Knowledge Library
Cloudswitched Ltd.

PREPARED BY

VERSION

2026 Edition

FORMAT

Interactive PDF

00

How to use this roadmap

The technology roadmap translates your IT strategy into a visual three-year timeline of planned initiatives, investments and milestones across four workstreams — **infrastructure, security, cloud and digital workplace**. Year 1 lays the foundations, Year 2 accelerates, Year 3 optimises and extracts value. Each row is one initiative the business has chosen to invest in.

Plot each initiative under the target quarter, name an accountable owner, log the budget envelope, and tick the status as it moves from **Planned** to **Active** to **Done**. Roll the row budgets up into the year × workstream summary on the closing page; carry that figure into the IT budget. Review the roadmap quarterly with leadership and re-baseline annually — technology plans that aren't revisited become wishlists.

WHAT THIS ROADMAP COVERS

Three planning years, four workstreams, twelve quarterly checkpoints and a workstream × year budget roll-up — the artefact a UK SME leadership team can read in a single sitting and use to align spend against business priorities. Every initiative cell is fillable in any modern PDF viewer; every status indicator is a real checkbox after download.

WHY A WRITTEN ROADMAP MATTERS

Without a roadmap, IT spend follows the loudest voice in the room — the renewal that just landed, the breach that just happened, the project a director championed last week. A visible roadmap turns IT from reactive cost into **plannable investment**, gives finance a 36-month spend curve to model against, and gives the board confidence that security, resilience and growth are sequenced rather than competing.

The four workstreams

- **Infrastructure** — network refresh, connectivity, cabling, servers, on-site environment.
- **Security** — Cyber Essentials, EDR, MFA / Zero Trust, backup, awareness training, pen testing.
- **Cloud** — Microsoft 365, Azure / AWS, file-server migration, Teams telephony, SaaS consolidation.
- **Digital Workplace** — collaboration tooling, Power BI dashboards, AI / automation, line-of-business apps.

01

Roadmap overview & Year 1 — Foundation

Capture the roadmap metadata, then plot Year 1. Address critical gaps, certify the security baseline, establish backup and DR, and build the platform that Year 2 and Year 3 depend on.

Roadmap overview

Organisation	_____
Roadmap period	_____
Prepared by	_____
Version	_____
Last updated	_____

Q1 Q1-Q2 — Critical priorities

The non-negotiables — security baseline, backup and DR, documentation. Spend on these in the first six months pays back across the whole plan.

INITIATIVE	OWNER	TARGET	BUDGET	STATUS		
_____	_____	_____	£ _____	☐ PLAN	☐ ACTIVE	☐ DONE
_____	_____	_____	£ _____	☐ PLAN	☐ ACTIVE	☐ DONE
_____	_____	_____	£ _____	☐ PLAN	☐ ACTIVE	☐ DONE
_____	_____	_____	£ _____	☐ PLAN	☐ ACTIVE	☐ DONE
_____	_____	_____	£ _____	☐ PLAN	☐ ACTIVE	☐ DONE
SUBTOTAL — Q1-Q2			£ _____			

Q3 Q3-Q4 — Build & improve

Build on the baseline — first cloud migration phase, endpoint rollout, network upgrades, written IT policy. Year 1 closes with a defensible posture.

INITIATIVE	OWNER	TARGET	BUDGET	STATUS		
_____	_____	_____	£ _____	☐ PLAN	☐ ACTIVE	☐ DONE
_____	_____	_____	£ _____	☐ PLAN	☐ ACTIVE	☐ DONE
_____	_____	_____	£ _____	☐ PLAN	☐ ACTIVE	☐ DONE
_____	_____	_____	£ _____	☐ PLAN	☐ ACTIVE	☐ DONE
SUBTOTAL — Q3-Q4			£ _____			

02

Year 2 — Acceleration

Foundations laid, Year 2 accelerates. Bigger transformational projects can now land safely on top of the Year 1 baseline — cloud migration phase 2, network refresh, Cyber Essentials Plus, Teams telephony, first business-intelligence dashboards. This is where IT starts to be visibly worth its line in the budget.

Y2 Year 2 initiatives

Six to eight strategic projects across the four workstreams. Stage them so that no two heavy migrations land in the same quarter, and so that security capability matures alongside cloud adoption.

INITIATIVE	OWNER	TARGET	BUDGET	STATUS		
-----	-----	-----	£ -----	☐ PLAN	☐ ACTIVE	☐ DONE
-----	-----	-----	£ -----	☐ PLAN	☐ ACTIVE	☐ DONE
-----	-----	-----	£ -----	☐ PLAN	☐ ACTIVE	☐ DONE
-----	-----	-----	£ -----	☐ PLAN	☐ ACTIVE	☐ DONE
-----	-----	-----	£ -----	☐ PLAN	☐ ACTIVE	☐ DONE
-----	-----	-----	£ -----	☐ PLAN	☐ ACTIVE	☐ DONE
-----	-----	-----	£ -----	☐ PLAN	☐ ACTIVE	☐ DONE
SUBTOTAL — YEAR 2			£ -----			

YEAR 2 STAGING TIPS

Keep **one big-bet cloud project** and **one big-bet security project** running concurrently — never two of either. Schedule penetration testing 8 weeks *after* the largest migration so findings reflect the new state. Reserve Q4 for stabilisation, end-of-year reporting and budget reset rather than launching another major workstream.

03

Year 3 — Optimisation

By Year 3 the IT estate should be predictable, defensible and largely cloud-native. This year is about **optimisation** — AI and automation pilots, full Zero Trust architecture, ISO 27001 preparation, advanced analytics, and the second hardware refresh cycle. Spend per user should plateau or fall; resilience should rise.

Y3 Year 3 initiatives

Optimise, automate, and extract maximum value from the platform built in Years 1 and 2. Five to seven initiatives is plenty — depth, not breadth, is the goal this year.

INITIATIVE	OWNER	TARGET	BUDGET	STATUS		
-----	-----	-----	£ -----	☐ PLAN	☐ ACTIVE	☐ DONE
-----	-----	-----	£ -----	☐ PLAN	☐ ACTIVE	☐ DONE
-----	-----	-----	£ -----	☐ PLAN	☐ ACTIVE	☐ DONE
-----	-----	-----	£ -----	☐ PLAN	☐ ACTIVE	☐ DONE
-----	-----	-----	£ -----	☐ PLAN	☐ ACTIVE	☐ DONE
-----	-----	-----	£ -----	☐ PLAN	☐ ACTIVE	☐ DONE
SUBTOTAL — YEAR 3			£ -----			

Dependency mapping

List the dependencies that link initiatives across years — for example, “Cloud Migration Phase 2 depends on Cyber Essentials Plus.” Surface them now so they can be sequenced, not so they can be discovered in a steering meeting.

INITIATIVE	DEPENDS ON	PREREQUISITE	RISK IF SLIPPED
-----	-----	-----	-----
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04

Budget summary & sign-off

Roll the initiative-level budgets up into the matrix below — year on the rows, workstream on the columns. The totals row and column show where the spend lands and where it skews. Use this as the page you carry into the board pack.

YEAR	INFRASTRUCTURE	SECURITY	CLOUD	DIGITAL WORKPLACE	TOTAL
Year 1 — Foundation	£ _____	£ _____	£ _____	£ _____	£ _____
Year 2 — Acceleration	£ _____	£ _____	£ _____	£ _____	£ _____
Year 3 — Optimisation	£ _____	£ _____	£ _____	£ _____	£ _____
WORKSTREAM SUBTOTAL	£ _____	£ _____	£ _____	£ _____	£ _____
THREE-YEAR TOTAL					£ _____

Roadmap assumptions & risks

PREPARED BY

DATE

APPROVED BY

Need help building a technology roadmap?

Cloudswitched's vCIO service builds three-year technology roadmaps that align IT investment with business growth plans — security baseline, cloud strategy, refresh cadence, dependency mapping and a board-ready budget. Quarterly reviews keep the plan honest.

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cloudswitched.com/services/it-support



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