



IT Strategy Checklist Template

For Growing Chicago Businesses

Use this checklist to assess whether your current IT environment is prepared to support growth, security, and long-term planning.

You don't need to complete everything at once. The goal is visibility and prioritization.

1. Business & Growth Alignment

- We have documented growth plans for the next 12–24 months
- We know how many employees we expect to add
- We understand how growth will impact IT costs
- Leadership agrees on acceptable downtime and risk tolerance
- IT decisions are discussed at the leadership level (not just when something breaks)

NOTES / GAPS IDENTIFIED:

2. Current IT Environment Overview

- All business devices are inventoried
- We know which systems are business-critical
- There is clear ownership of IT decisions
- Employees use approved tools and software
- We have visibility into cloud apps and file storage

NOTES / GAPS IDENTIFIED:

3. Security & Risk Basics

- All devices have security protection installed
- Business email is protected against phishing
- User access is reviewed when employees join or leave
- Data is backed up regularly
- We know what our cyber insurance requires (if applicable)

NOTES / GAPS IDENTIFIED:

4. Standards & Consistency

- There are standard devices or operating systems in use
- Employees know where files should be stored
- Password and access rules are documented
- New hires are onboarded consistently
- Vendors and tools are reviewed periodically

NOTES / GAPS IDENTIFIED:

5. IT Planning & Budgeting

- We have an annual IT budget (even a rough one)
- Major IT projects are planned in advance
- Security investments are prioritized intentionally
- IT costs are predictable month to month
- We review IT performance at least once per year

NOTES / GAPS IDENTIFIED:

4. Next-Step Priorities (12–24 Months)

- Immediate fixes needed (next 90 days):

- Medium-term improvements (6–12 months):

- Longer-term initiatives (12–24 months):

- Who owns IT strategy internally?



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