IT STRATEGIC PLANNING CHECKLIST

Use this checklist to help guide your IT Strategic Planning Process.

1 **IDENTIFY KEY STAKEHOLDERS**

- Stakeholder assessment
- In IT and outside of IT
- Include internal and external
- May want to include input from customers

2 **POLICIES, PROCEDURES, AND GUIDELINES**

- Establish planning processes and timelines
- Clearly define guiding principles
- Establish parameters

3 **FUTURE STATE VISION**

- Identify target IT maturity level
- Identify strategies to close gaps and improve performance
- Raise the bar, innovate to move the needle on organization goals and objectives
- Maximize value to the organization

4 **CURRENT STATE ASSESSMENT**

- Assess current IT maturity level
- Gather feedback from business and IT stakeholders
- Assess current alignment with business goals and objectives
- Identify gaps/opportunities

5 **GOALS AND OBJECTIVES**

- Understand organization goals and objectives
- Define IT vision *(desired future state – what you want to be)*
- Define IT mission *(purpose and how to achieve Vision)*
- Set IT goals and objectives *(how will progress be measured)*
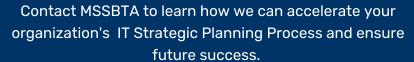
6 **IT ROADMAP**

- Review prior roadmaps/plans; identify keep, stop, and continue initiatives
- Identify new initiatives needed to achieve the desired future state
- Prioritize initiatives based on strategic alignment, cost, risk, and complexity
- Develop initiative roadmap
- Determine budget impact/needs

7 **MEASURE PROGRESS**

- Identify key portfolio initiative metrics
- Set targets
- Develop a monthly *(minimum)* dashboard
- Implement leadership, governance, and accountability for each initiative
- Implement weekly dashboards for each initiative *(include cost, time, and quality metrics)*
- Review progress regularly and formally at least monthly
- **Take corrective action**

8 **REVIEW AND REVISE**

- Review organization goals and objectives along with the IT strategic plan regularly and formally, at least quarterly
- **Make adjustments**