

Prepare the next business IT discussion.

A practical checklist for business leaders, service owners, IT and finance. Use it to define the review and test the basis for investment.

01 Business decisions and scope

- ☐ Which business decision, service risk or investment cycle drives the review?
- ☐ Which locations, services, staff roles and technology assets are in scope?
- ☐ Which frameworks and obligations are relevant to this business?
- ☐ Who owns services, evidence, technical review and expenditure approval?

02 Evidence and investment options

- ☐ Which findings have supporting evidence, and which areas are not assessed?
- ☐ How will workloads, condition, dependencies and support dates be checked?
- ☐ Can the report explain business impact and the options for IT and finance?
- ☐ Which costs need quotes, and are migration, licensing and VAT included?

03 Onboarding and the proposal

- ☐ Which data sources, integrations and collection methods are agreed?
- ☐ What access and review responsibilities do IT staff and partners need?
- ☐ What package, support, training and pilot terms are in the written proposal?
- ☐ Who reviews privacy, processing and supplier questions before connecting data?

Choose frameworks appropriate to your business and use their current primary sources. Cyber Essentials certification requires the applicable scheme assessment; a planning report does not certify controls.

[IASME: Preview the Cyber Essentials question sets](#)

[Explore asitplan for business](#)

Connect service risks to investment decisions.

Print this worksheet or reuse its columns. Record evidence gaps, responsibilities and a review point.

BUSINESS / LOCATION / SERVICE

INVESTMENT REVIEW DATE

SERVICE OWNER / INVESTMENT APPROVER

Service / decision	Evidence / dependency / gap	Action / owner / review
Critical services		
Staff device cohort		
Recovery requirements		
Network dependencies		
Access review scope		
Investment assumptions		

Decision / assumptions to validate

Discuss your business technology review: [Request a demo](#)