

Your 2027 Technology Planning Checklist

CLARITY
PRIORITIES
INVESTMENT
IMPACT

A practical executive checklist to align technology, cybersecurity, AI and investment priorities for 2027.

1. BUSINESS & TECHNOLOGY ALIGNMENT

Make technology support the business strategy.

- ☐ 2027 business goals and priorities are defined
- ☐ Growth, efficiency and risk objectives are clear
- ☐ Technology priorities map to strategic initiatives
- ☐ Executive stakeholders are aligned on outcomes

2. CYBERSECURITY & RESILIENCE

Reduce risk and protect business continuity.

- ☐ Cyber risks are reviewed and prioritized
- ☐ Identity, access and security controls are assessed
- ☐ Incident response and recovery plans are tested
- ☐ Vendor and third-party risks are understood

3. AI & AUTOMATION READINESS

Turn AI opportunity into controlled business value.

- ☐ AI opportunities are identified across key workflows
- ☐ Use cases are prioritized by value, feasibility and ROI
- ☐ Employee AI use and Shadow AI are understood
- ☐ AI governance and acceptable-use policies are established
- ☐ Data, security and technology readiness are evaluated

4. INFRASTRUCTURE & MODERNIZATION

Know what must change to support what comes next.

- ☐ Critical systems and applications are inventoried
- ☐ Performance, reliability and scalability are assessed
- ☐ Technical debt and end-of-life systems are identified
- ☐ Modernization needs and dependencies are documented

5. INVESTMENT & BUDGET

Make value-driven investment decisions.

- ☐ 2027 technology budget aligns to business priorities High-value initiatives are prioritized
- ☐ TCO, ROI and expected business impact are documented
- ☐ Funding, ownership and resource needs are confirmed

6. ROADMAP & SUCCESS MEASURES

Turn priorities into measurable execution.

- ☐ A 12-month technology roadmap is documented
- ☐ Milestones, dependencies and quick wins are defined
- ☐ Risks, contingencies and owners are assigned
- ☐ Success metrics and review cadence are established

Ready to Build Your 2027 Technology Plan?

Use the IT Strategy Blueprint + Cybersecurity Strategy on a Page to turn priorities into an actionable roadmap.

Get the 2027 Technology
Planning Toolkit