



You Request. We Respond.
IT Gets Done!

CFO's Quick Guide To A Future-Proof IT Strategy Checklist

Use this checklist to gain a baseline assessment of the current state of a company's IT functions and align them with financial objectives and broader organizational goals.

- ☐ **Assess IT Maturity:** Is IT viewed as a reactive expense, or a strategic, proactive investment? Shift the perception and function of IT towards enterprise-wide digital value creation.
- ☐ **Review Security Posture:** Formally evaluate the organization's security posture and understand vulnerabilities, with a goal of building a zero trust architecture and security-centric culture.
- ☐ **Score Technology Investment Value:** Apply the CFO Technology Scorecard to major IT initiatives. Quantify investments based on Security & Risk Mitigation, ROI/Efficiency, Compliance, and Scalability.
- ☐ **Evaluate Investments For Technology Scalability:** See how IT investments will help the business as it adapts and changes. Make sure there's a transparent understanding of current technologies and how they contribute to overall scalability.
- ☐ **Verify Compliance Requirements:** Confirm that all core systems are continually updated and aligned with relevant standards (HIPAA, PCI, etc). The goal should be to help ensure compliance and reduce the likelihood of regulatory penalties.
- ☐ **Review Readiness For AI/Automation:** Identify and prioritize opportunities for AI-driven automation to speed up IT processes. This change can lead to operational cost savings and productivity gains.