Checklist to create your technology roadmap

A technology roadmap is a planning tool that aligns your business objectives to long- and short-term technology solutions. It should help you understand your current technological systems, set technology development priorities and provide a timeline for the implementation of new systems. This checklist leads you through the steps you need to follow to create your roadmap. Modify it as necessary to reflect your company's circumstances and objectives.

☐ Identify your strategic objectives

☐ Prepare a strategic plan for your business, if you haven't already done so.

☐ Make a list of your major strategic objectives for the next three to five years.

☐ Identify the financial and operational impact you hope to generate—use these as key performance indicators to measure the effectiveness of your strategy.

☐ Plan for the future

☐ Consider what technology and tools you will need to achieve your goals and stay competitive in the next three to five years.

☐ Consider what future applications you will want to integrate in your enterprise systems to achieve your goals.

☐ Consider if migrating some applications to the cloud is a good opportunity for your business.

☐ Define your functional needs and priorities

☐ Review your business processes.

☐ Audit your current technologies including:

- ☐ Performance and age of current technology
- ☐ How well current technology meets your needs
- ☐ System and application dependencies
- ☐ Current costs and return on those expenses

☐ Identify technology gaps or areas where your existing systems fall short.

☐ Identify the functional capabilities needed to effectively support future business needs or improve inefficient processes.

☐ Prepare an itemized prioritized list of what steps need to be taken for every business function.

- ☐ Prioritize critical systems that are foundational for future developments.

- ☐ Prioritize areas with the most pressing needs for improvements.
- ☐ Prioritize quick-wins that can build support for your long-term plan.

☐ Evaluate the costs

- ☐ Identify various technologies that meet your needs and specify:
    - ☐ Costs
    - ☐ Capabilities
    - ☐ Implementation timelines
    - ☐ How the technology will mature over time
- ☐ Take account of additional or ongoing costs such as:
    - ☐ New infrastructure costs
    - ☐ Subscription fees
    - ☐ Annual maintenance costs
    - ☐ Support fees

☐ Establish a timeline

- ☐ Create a realistic timeline based on:
    - ☐ Priorities
    - ☐ Duration of each project
    - ☐ Available resources
    - ☐ Seasonal rushes
    - ☐ Technological dependencies
- ☐ Detail how many people need to work on each aspect of your project at various points in time.
    - ☐ Don't forget to include maintenance for new systems you are developing.
- ☐ Spell out which employee needs to be trained on which application, at what time and by whom to prepare for new application deployment or updates to existing systems.
- ☐ Create multiple short-term targets that are easily achievable and lead to long-term accomplishments.
- ☐ Create a release plan with set dates and requirements that can be communicated across your organization.
- ☐ Identify key milestones that can be celebrated as small victories.
- ☐ Identify risk factors that could prevent you from achieving your goals and milestones.

☐ Create a digital culture

- ☐ Define and share you vision for change. Talk often about your vision and address peoples' concerns and anxieties.

- [ ] Identify or hire change leaders whose main roles are to deliver on your vision.
- [ ] Look at your organizational structure, job descriptions, and performance and compensation systems to ensure they're in line with your vision.
- [ ] Recognize and reward people for making change happen. For example, you can recognize employees in internal communications and reward them with bonuses or points exchangeable for gifts.
- [ ] Identify people who are resisting change and find ways to help them adapt by offering training.

- [ ] **Appoint an IT steering committee**

- [ ] Appoint an IT steering committee made up of leaders and key stakeholders from IT and other departments.
- [ ] Create a regular communication routine to help employees understand the changes you are making.
- [ ] Empower specific people within each team to drive technology projects and test new technology solutions.
- [ ] Monitor the project by planning regular status reports to the IT steering committee.
- [ ] Regularly revisit your roadmap and make changes as needed to overcome challenges or adapt to changing conditions.

Get expert help

Many entrepreneurs and management teams don't have the expertise, time or resources to manage a major technology transformation initiative. It makes sense to get the help of an experienced, independent consultant who can provide you with the knowledge and expertise you need to manage your project. Learn more at bdc.ca/consulting.