TECHNOLOGY STRATEGY

Virtual CIO Readiness Workbook

Ten questions that tell you whether your business needs strategic technology leadership.

> Most businesses don't fail at technology because they bought the wrong thing. They fail because nobody senior was ever accountable for the direction. This workbook takes about 30 minutes with your leadership team. It gives you a score out of 30, and a clear read on where the gaps are.

TIME NEEDED
About 30 minutes

WHO WITH
Your leadership team

YOU GET
A score out of 30

How to use this workbook

Work through it with the people who make the decisions. That usually means the owner or managing director, whoever holds the budget, and whoever currently carries technology. It works best as one sitting rather than something circulated by email.

Be honest rather than generous. A score you've flattered is worth nothing to you. The point isn't to pass. It's to find the three or four areas where a bit of structure would take the most risk out of the business.

Scoring

Score each of the ten areas from 0 to 3.

0	**Not started.** Nobody owns this today.
1	**Started, but nothing is written down.** It lives in someone's head.
2	**In place and documented,** but not reviewed on any set cycle.
3	**In place, owned by a named person,** and reviewed on a schedule.

> The gap between 2 and 3 is the one that catches people. Plenty of businesses have written the document. Far fewer have put a name and a date against it. A policy nobody revisits stops describing the business within about a year.

What you'll end up with

A score out of 30, a readiness band, and ten filled-in rows telling you who owns what. Take the completed workbook into your next leadership meeting. It's more useful than any report we could write for you at this stage, because the answers are yours.

1 Business goals documented and understood

Technology can't support a plan nobody has written down. If your IT decisions aren't anchored to where the business is going, you can buy well and still end up somewhere you didn't intend.

WHAT GOOD LOOKS LIKE

- [ ] Your growth plan for the next two to three years exists as a document, not just as a conversation.
- [ ] Whoever makes the technology decisions has read it.
- [ ] Every significant technology spend can be traced back to a goal in it.

SCORE

0 1 2 3

WHERE WE ARE TODAY

OWNER

REVIEW DATE

2 Technology environment assessed

You can't plan from a guess. Almost every assessment turns up something the business was certain wasn't there. Usually a system still running that nobody owns.

WHAT GOOD LOOKS LIKE

- [ ] You hold a current list of every system, licence, device and supplier in use.
- [ ] Someone has reviewed that list in the last 12 months, not just built it once.
- [ ] You know which systems are past end of support, and what the plan is for each.

SCORE

0 1 2 3

WHERE WE ARE TODAY

OWNER

REVIEW DATE

3 Cyber security posture reviewed

Insurers ask. Tenders ask. Clients ask. An honest answer is worth considerably more to you than a confident one, because the honest answer is the only one you can act on.

WHAT GOOD LOOKS LIKE

- ☐ Multi-factor authentication (a second check beyond the password) is enforced on every account, with no exceptions made for senior staff.
- ☐ You have a written, ranked view of your top risks, with a named owner against each.
- ☐ The review happened within the last 12 months and the next one is already in the calendar.

WHERE WE ARE TODAY

SCORE

0 1 2 3

OWNER

REVIEW DATE

4 Microsoft 365 governance and security optimised

Most businesses use a fraction of what they already pay for, and leave the security settings where the vendor left them. Both of those cost money quietly.

WHAT GOOD LOOKS LIKE

- ☐ You know your Microsoft Secure Score and whether it's moving up or down.
- ☐ Sharing, guest access and file permissions follow a written rule rather than habit.
- ☐ Licences are matched to roles, and the ones nobody uses have been removed.

WHERE WE ARE TODAY

SCORE

0 1 2 3

OWNER

REVIEW DATE

5 Business continuity and disaster recovery planned

The question was never whether you have backups. It's whether anyone has restored from them.

WHAT GOOD LOOKS LIKE

- ☐ You've agreed how long the business can be down, and how much data it can afford to lose. Both written as actual numbers.
- ☐ A full restore has been tested end to end in the last 12 months.
- ☐ Staff know what to do in the first hour of an outage without having to ask.

SCORE

0 1 2 3

WHERE WE ARE TODAY

OWNER

REVIEW DATE

6 Technology governance and policies established

Policies are what let you say no consistently. Without them, every decision gets argued from scratch and the loudest request wins.

WHAT GOOD LOOKS LIKE

- ☐ Written policies cover acceptable use, access, passwords, devices and suppliers.
- ☐ Staff have actually seen them, and new starters get them on day one.
- ☐ Each policy has an owner and a review date, not just an author.

SCORE

0 1 2 3

WHERE WE ARE TODAY

OWNER

REVIEW DATE

7 Annual technology budget agreed

Unplanned technology spend is the most expensive kind. It turns up at the worst possible moment and gets approved anyway, because by then there's no choice.

WHAT GOOD LOOKS LIKE

- ☐ Technology has its own line in the annual budget, split between running costs and investment.
- ☐ Licence renewals and hardware replacement are forecast ahead, not discovered.
- ☐ Last year's actual spend was compared against what was planned.

WHERE WE ARE TODAY

SCORE

0 1 2 3

OWNER

REVIEW DATE

8 Technology roadmap reviewed at least annually

A roadmap that never gets reviewed is a document. A roadmap that gets reviewed is a decision-making tool. The review is the whole value.

WHAT GOOD LOOKS LIKE

- ☐ A multi-year plan exists covering security, productivity, cloud and AI, sequenced deliberately.
- ☐ It's been reviewed with the leadership team within the last 12 months.
- ☐ Priorities have genuinely changed as a result of a review. A plan that never moves isn't being used.

WHERE WE ARE TODAY

SCORE

0 1 2 3

OWNER

REVIEW DATE

9 AI readiness assessed

AI reads whatever your staff can already reach. If permissions have drifted over the years, AI is what makes that visible, and it tends to happen in week one.

WHAT GOOD LOOKS LIKE

- ☐ You've checked who can access what, before switching any AI tool on.
- ☐ You know which of your data is accurate enough to be worth asking questions of.
- ☐ There's a written position on what staff may and may not put into public AI tools.

WHERE WE ARE TODAY

SCORE

0 1 2 3

OWNER

REVIEW DATE

10 KPIs and success metrics defined

Without agreed measures, technology gets judged on how loudly it breaks. That's a poor scoreboard, and it rewards the wrong behaviour.

WHAT GOOD LOOKS LIKE

- ☐ You've agreed what technology should improve this year, expressed in numbers.
- ☐ Someone reports against those numbers to leadership on a set cycle.
- ☐ The reporting covers business outcomes, not just ticket counts and uptime.

WHERE WE ARE TODAY

SCORE

0 1 2 3

OWNER

REVIEW DATE

Your score

Transfer each score across, then add them up.

#	AREA	SCORE
1	Business goals documented and understood	/ 3
2	Technology environment assessed	/ 3
3	Cyber security posture reviewed	/ 3
4	Microsoft 365 governance and security optimised	/ 3
5	Business continuity and disaster recovery planned	/ 3
6	Technology governance and policies established	/ 3
7	Annual technology budget agreed	/ 3
8	Technology roadmap reviewed at least annually	/ 3
9	AI readiness assessed	/ 3
10	KPIs and success metrics defined	/ 3
	Total	**/ 30**

Before you read the bands, look at the individual rows. Any single 0 in cyber security, continuity or Microsoft 365 governance matters more than the total does. A business scoring 24 with an untested backup is carrying more risk than one scoring 16 across the board.

What your score means

0 TO 9

Reactive

Technology is being handled issue by issue. That works while the business is small and stops working without warning, usually during growth, an audit, or an incident. The fastest gain here isn't a purchase. It's writing down what you already have and agreeing who owns it.

Start with: the environment assessment (2), then multi-factor authentication and a tested restore (3 and 5).

10 TO 17

Developing

The fundamentals are in place but they're carried by individuals rather than by the business. This is the most common band, and the most fragile, because it depends on specific people staying. Structure is what converts what you've built into something durable.

Start with: putting owners and review dates against what already exists (6), then the budget (7).

18 TO 24

Managed

Technology is well run. What's usually missing at this level is the forward view. You're managing today's environment competently without a deliberate plan for the next three years, which means investment stays sound but reactive.

Start with: the roadmap (8) and agreed measures (10). This is the band where a Virtual CIO adds the most, fastest.

25 TO 30

Strategic

Technology is genuinely governed. At this level the value is in challenge and independence, not in setup. An outside perspective is what stops a well-run environment quietly optimising for the wrong thing.

Start with: AI readiness (9), which is where even strong environments tend to have the least written down.

What changes with a Virtual CIO

A Virtual CIO is an outsourced technology executive who works with your leadership team on direction, planning and governance. It isn't day-to-day IT support. It's the layer above it, and for most businesses between 10 and 250 staff it's the layer that's missing.

Every one of the ten areas in this workbook is something a vCIO owns on your behalf. Not as a report that lands once and gets filed, but as a standing quarterly rhythm with your leadership team.

Quarterly business reviews

Progress against the roadmap, risks reassessed, next quarter's priorities agreed with your leadership team.

Executive decision support

Independent advice on investments and vendor selection, framed around outcomes rather than products.

Board and leadership reporting

Reporting on risk, roadmap progress and business outcomes, in language your board can act on.

Managed IT keeps technology running.
A Virtual CIO makes sure it's moving the business forward.

Talk it through with someone who's done it

If you've filled this in, you already know more about your position than most businesses your size. The useful next step is a conversation about the three lowest rows, not a proposal.

Book a technology strategy session. Bring the completed workbook. We'll go through your scores, tell you which gaps actually matter for a business like yours, and be straight with you if the answer is that you're in good shape and don't need us yet.

Book a Technology Strategy Session

Bring your completed workbook. We'll work through the three lowest rows together.

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About LOOKUP

LOOKUP is a Sydney managed IT and cyber security provider, based at 320 Princes Highway, Rockdale, supporting small and medium businesses across Greater Sydney. Our Virtual CIO service gives leadership teams the strategic technology guidance they need without the cost of a full-time Chief Information Officer.

Every engagement runs on the LOOKUP Business Modernisation Framework: discover, secure, modernise, standardise, optimise, prepare, implement, improve. It's the same structure this workbook follows.

Peter Kantarelis

Founder, LOOKUP · Business Technology Strategist

Peter helps Australian organisations modernise technology, strengthen cyber security and prepare for practical AI adoption. More than 25 years of helping Australian businesses make better technology decisions through structured planning, governance and long-term partnership.

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