



## Strategic Systems Assessment Checklist

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### 1. IT Asset Inventory & Optimization

- ☐ Centralize IT asset inventory in a CMDB or SaaS-based platform.
- ☐ Audit software license usage vs. actual deployments.
- ☐ Eliminate unused or redundant software subscriptions.
- ☐ Retire outdated hardware and unsupported devices.
- ☐ Align cloud contracts with actual consumption.

### 2. Network & Infrastructure Evaluation

- ☐ Assess bandwidth, latency, and uptime regularly.
- ☐ Design a scalable, resilient network suitable for hybrid and cloud environments.
- ☐ Consolidate vendors and simplify infrastructure contracts.

### 3. Cybersecurity & Vulnerability Management

- ☐ Automate patch management, antivirus, and security updates.
- ☐ Enforce Multi-Factor Authentication (MFA) on all critical systems.
- ☐ Implement AI-driven threat detection and response tools.
- ☐ Conduct penetration testing at least twice a year.

#### 4. Compliance & Risk Governance

- ☐ Classify sensitive data, restrict access, and enforce encryption.
- ☐ Schedule quarterly internal audits for compliance readiness.
- ☐ Adopt frameworks like NIST CSF or ISO 27001.
- ☐ Share compliance reports with executive leadership.

#### 5. Software & Application Performance

- ☐ Use APM tools (e.g. Datadog or AppDynamics) to monitor app performance.
- ☐ Adopt agile development cycles to fix bugs and enhance reliability.
- ☐ Plan the migration to cloud-native, scalable, AI-ready architectures.

#### 6. Cloud Strategy & Cost Optimization

- ☐ Use FinOps tools to gain full visibility into cloud spending.
- ☐ Enforce mandatory tagging and assign budgets by team or project.
- ☐ Perform monthly resource cleanups and automate shutdown of idle assets.

#### 7. Backup & Disaster Recovery

- ☐ Follow the 3-2-1 rule: 3 copies of data, 2 media types, 1 offsite or offline.
- ☐ Maintain both local and cloud backups; test recovery monthly.
- ☐ Run disaster recovery simulations quarterly in isolated environments.
- ☐ Define and communicate Recovery Time Objectives (RTO) and Recovery Point Objectives (RPO).

## 8. MSP Evaluation & IT Support Partnership

- ☐ Request monthly and quarterly service reports with clear KPIs.
- ☐ Review the MSP's tools for monitoring, security, and automation.
- ☐ Hold quarterly strategic alignment sessions with your MSP.