



Technology Priorities Checklist for 2026

Use this checklist to test technology assumptions, risks, and ownership before plans are finalized.

1. Infrastructure & Core Systems

- Core systems can support expected growth, staffing changes, and operational needs through 2026.
- Capacity planning reflects realistic usage and performance requirements.
- Aging infrastructure and deferred upgrades are documented and intentional.
- Cloud, hybrid, and on-premise decisions align with business requirements, not legacy habits.
- Single points of failure are identified and addressed.

2. Cybersecurity & Risk Governance

- Security policies are current, documented, and enforced.
- Cyber risk ownership is clearly defined at the leadership level.
- Incident response roles and escalation paths are documented and understood.
- Cyber insurance requirements and assumptions have been reviewed.
- Regulatory and compliance obligations are clearly understood

3. Identity, Access & Permissions

- Regular access reviews are performed and enforced.
- Privileged accounts are limited, monitored, and justified.
- Access aligns with current roles and responsibilities.
- Identity systems support modern authentication and access controls.

4. Backup, Recovery & Business Continuity

- Backup systems are actively monitored and regularly tested.
- Backup integrity is verified before restoration.
- Recovery time expectations are realistic and understood by leadership.
- Clean recovery procedures are documented and validated.
- Business continuity assumptions reflect current operations

5. Vendor, Licensing & Cost Management

- Auto-renewals and contract timelines are clearly understood
- License usage aligns with actual business needs
- Redundant or underused tools have been identified.
- Critical vendors have clear ownership and accountability.
- Third-party risk is assessed for key providers.

6. Data Strategy & Governance

- Data ownership and classification are clearly defined.
- Retention and deletion policies align with legal and business requirements.
- Sensitive data is appropriately protected and monitored.
- Reporting and analytics support decision-making, not just operations.

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7. Application & Platform Strategy

- Core applications align with current and future business processes
- Customizations and integrations are documented and maintainable
- Technical debt is identified and prioritized
- Platform decisions consider scalability, security, and vendor stability

Leadership question:

Do our applications support the business, or does the business work around them?

8. People, Process & Skills

- Internal skills align with current and planned technology platforms
- Training and development plans address key gaps
- Key roles are documented and not dependent on single individuals
- External partners are clearly defined where internal capacity is limited

Leadership question:

Do we have the right mix of skills and support to execute our plans?

9. Ownership, Oversight & Decision-Making

- Clear ownership exists for technology planning and alignment
- Technology decisions are tied to business goals and strategy
- Leadership receives regular updates on risk, performance, and readiness
- Strategic oversight extends beyond day-to-day IT support

Leadership question:

Is there a single point of accountability for technology alignment?

10. Final Leadership Check

- Assumptions have been validated, not just carried forward
- Risks and tradeoffs are understood before plans are finalized
- Technology planning supports long-term business objectives
- Leadership is confident in execution and resilience going into 2026

Pressure-test your 2026 technology plan with TRC

A short, leadership-level conversation can help confirm assumptions, identify gaps, and reduce uncertainty before plans are finalized.

Schedule a 30-minute technology planning conversation here: trc-group.com/contact