# Quarterly IT Planning Checklist

Use this checklist to stay ahead of IT issues and align your tech with your business goals—quarter by quarter.

## ☐ Hardware & Infrastructure

☐ Review aging devices (laptops, servers, firewalls)  
☐ Plan for replacements within lifecycle windows  
☐ Confirm warranties and support coverage

## ☐ Software & Licensing

☐ Review license usage and renewals  
☐ Decommission unused or duplicate services  
☐ Ensure legal compliance and cost efficiency

## ☐ Security & Backup

☐ Review logs and alerts  
☐ Test backups and recovery plans  
☐ Schedule employee security awareness refresher

## ☐ Growth & Strategy

☐ Evaluate upcoming projects or expansions  
☐ Adjust support plan for headcount changes  
☐ Identify tech bottlenecks or risks

## ☐ Budget & Vendor Planning

☐ Update IT budget forecasts  
☐ Review MSP reports and KPIs  
☐ Schedule quarterly review with your MSP