

Executive IT Governance & Health Checklist

A 5-Minute Alignment & Risk Audit for CEOs, COOs, and Board Members

Purpose & Instructions: Use this checklist to quickly evaluate whether your technology infrastructure, leadership structure, and vendor contracts match your strategic business objectives. Review each statement and mark the items currently in place.

1. LEADERSHIP & STRATEGIC ALIGNMENT

- ☐ **Executive Roadmap:** Multi-year technology roadmap tied directly to revenue targets, capital budgets, and regular board reporting.
- ☐ **Leadership Cost Optimization:** Bridging senior technology leadership needs without absorbing a full-time executive salary, benefits, and equity package (closing the \$200K+ full-time cost gap).
- ☐ **Transition Continuity:** Interim leadership plan active or ready to deploy if an executive search stalls or a vacancy occurs.
- ☐ **Business Outcome Language:** IT leadership communicates in P&L; terms, risk management, and ROI rather than technical jargon.

2. FRAMEWORKS, GOVERNANCE & COMPLIANCE

- ☐ **Recognized Frameworks:** IT service management operations structured around an ITIL-certified governance framework.
- ☐ **Regulatory Alignment:** Cloud and multi-site environments compliant with industry standards across accounting, healthcare, or regulated services.
- ☐ **Independent Board Voice:** Access to independent executive technical counsel for objective risk, vendor, and team-structure reviews.

3. VENDOR & CONTRACT OPTIMIZATION

- ☐ **Agency Retainer Audit:** Vendor/agency engagements bound by firm deliverables and deadlines, avoiding open-ended retainers that 'scope forever and finish never.'
- ☐ **Contract Negotiation:** Active executive negotiation of software, cloud (AWS/Azure), and hardware contracts to capture targeted savings.
- ☐ **Infrastructure Cost Control:** Telecom, data center, and operational IT spend audited regularly to optimize capital vs. operational expense.

4. SECURITY, BUSINESS CONTINUITY & SCALABILITY

- ☐ **Disaster Recovery RTO:** Modern security and business continuity platforms capable of restoring critical operations in hours (e.g., 4 hours) rather than weeks.
- ☐ **Multi-Site Infrastructure:** Cloud or virtualized infrastructure (e.g., Citrix/Azure) engineered to scale reliably across distributed locations and end users.
- ☐ **Execution Velocity:** Continuous Improvement Program in place to drive higher project completion rates and elevate user satisfaction.

Self-Assessment Scoring & Executive Action Plan

11–13 Checked	Strong Governance: Technology and leadership are well-aligned with business objectives.	Maintain momentum with periodic Board / Advisory reviews.
7–10 Checked	Operational Exposure: Systems function, but overpaying on retainers or lacking executive alignment.	Deploy Fractional Leadership (1–3 days/wk) to optimize governance and vendor costs.
Under 7 Checked	High Risk Priority: Executive leadership gap, open seat, or critical disaster recovery exposure.	Initiate an immediate Project Audit or Interim Executive leadership block.

Flexible Engagement Models (Sized to Your Need)

Board / Advisory	Monthly / Per-meeting Periodic strategy & risk briefings	Boards seeking an independent executive technical voice without full-time commitment.
Fractional Leadership	Ongoing · 1–3 days / week Embedded senior CIO judgment	Organizations modernizing tech, closing the \$200K salary gap, and establishing roadmaps.
Interim Leadership	Full-time · Fixed term Active leadership during search	Bridging executive vacancies, stalled CIO searches, or major organizational transitions.
Project-Based	Scoped · Fixed end date Defined initiatives & audits	Targeted cloud migrations, security audits, vendor renegotiations, or M&A; integrations.

Proven Executive Track Record: 75% CapEx reduction via budget ownership | **5wk → 4hr DR downtime** reduction | **\$250M P&L; managed** | **15% vendor cost savings** | **25% user satisfaction boost**

Schedule Your Confidential Strategy Consultation

Discuss your self-assessment score and evaluate fractional executive leadership with Alan D. Watson, Principal Consultant.

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