Next Year's Technology Plan

A framework for building a technology budget on purpose

Why we publish this

Every fall, businesses build next year's technology budget. Most build it in a hurry — or copy last year's and change the date. It gets approved, it gets filed, and then the year happens to it.

A technology plan isn't a shopping list. It is a set of decisions about where the business is going and what has to be true for it to get there. This is the framework we use with the companies we advise, and we have published it in full, free and without a form, because a plan you build yourself is worth more than one you are sold.

It is deliberately short. You should be able to fill in one page and know what you are doing next year.

The shape of the plan: one page

A working technology plan fits on a single page. Anything longer is usually a wish list with a header. The page has four parts:

1. **Where the business is going.** Headcount, locations, new services, anything changing about how people work.
2. **What that requires.** The capabilities implied by the line above — not products yet, capabilities.
3. **What is aging out.** Equipment and systems reaching the end of their useful life next year.
4. **What you are choosing to fund.** The line items, including the ones that protect you.

Everything below is how to fill those four boxes honestly.

Move one: start with the business, not the hardware

The most common budgeting mistake is starting from the equipment list. It feels concrete, and it is the wrong end of the problem. The equipment list tells you what you bought before, not what you need next.

Start instead with what the business is doing next year, and let the technology fall out of it:

- Are you hiring? How many, and where do they sit?
- Are you opening, closing, moving or reconfiguring a location?
- Is anyone changing how they work — more remote, more field, more shift coverage?
- Are you adding a service line, a system, or a compliance obligation?
- Is there a deadline the business already knows about that technology has to be ready for?

Write the answers as plain sentences. "We are adding six people in the spring" is a technology requirement; "replace four laptops" is a purchase order. The first tells you the second. It does not work the other way round.

The test

If you can trace every line in your budget back to something the business is actually doing, you have a plan. If some lines exist because they were there last year, you have an inheritance.

Move two: replace on a schedule, not in a crisis

Equipment does not fail politely. It fails on the busiest morning of the quarter, and the emergency version of a purchase is always the expensive one — expedited hardware, overtime labour, lost hours, and whatever the workaround costs while you wait.

Aging equipment is cheaper to plan for than to lose. The fix is unglamorous: know what you own, know roughly how old it is, and put the replacements on the calendar before they put themselves there.

A workable refresh rhythm

These are planning defaults, not rules. Your usage, environment and risk tolerance move them:

Asset	Typical planning horizon	What usually forces it early
Laptops / desktops	3–5 years	Battery life, OS support ending, performance complaints
Servers	5–7 years	Warranty expiry, capacity, virtualisation limits
Network gear	5–7 years	Firmware support ending, throughput, Wi-Fi standards
Firewalls	4–6 years	Subscription/licence expiry, vendor end-of-support
Backup hardware	4–6 years	Capacity growth, restore speed, media wear

End-of-support dates are the ones worth tracking hardest. An unsupported system is a security decision, not just an old machine.

Move three: budget for security and reliability on purpose

Security and reliability are the two lines most often left out of a technology budget, because nothing bad has happened yet. They then arrive anyway — as an incident, an outage, or an insurance questionnaire you cannot answer — and get paid for at emergency rates, out of a budget that never planned for them.

Put them in as a line you chose, not a surprise you absorb. At minimum:

- **Backup, and the testing of it.** An untested backup is not a backup; it is a hope. Budget the restore test, not just the storage.
- **Endpoint protection and monitoring** across every device that touches company data.
- **Identity and access** — multi-factor authentication, joiner/leaver process, password management.
- **Patching and end-of-support replacement**, which is where move two and move three meet.
- **A written incident response plan**, so the decisions are made before the bad morning rather than during it.

What underfunding this actually costs

We have seen an inadequate, cheap backup fail at exactly the wrong moment. Recovering from it cost about $450,000 — a figure that dwarfed every year of the savings that produced it.

The point is not the number. It is that the decision which produced it did not feel like a risk decision at the time; it felt like prudence. Resilience is the line item that looks optional right up until the week it is the only one that mattered.

The throughline: spend on purpose

The businesses that spend well on technology don't spend more. They spend on purpose.

Spending well is not a bigger number. It is a budget where every line traces to something the business is doing, where replacements are scheduled instead of reactive, and where the protective lines were chosen deliberately. That budget is usually calmer, and often smaller, than the reactive one — because almost nothing in it is being bought at emergency prices.

Filling in the page

Work top to bottom. Do not price anything until the first two boxes are honest.

1. **Business direction.** Three to six plain sentences about next year.
2. **Implied capabilities.** What those sentences require: capacity, coverage, mobility, resilience, compliance.
3. **Aging inventory.** Everything reaching the end of its horizon next year, with rough dates.
4. **Chosen line items.** Growth, replacement, security and reliability, and a contingency you name honestly.
5. **The one thing you are deliberately not doing.** A plan with no trade-off in it has not been made yet.

That last line is the one people skip. Writing down what you chose not to fund is what makes the rest a decision rather than a list.

Planning with a partner who thinks in years

A technology plan is easier to build with someone who has seen several of them play out, and who will still be there when next year becomes this year. Pro Link Systems has provided managed IT, cybersecurity, cloud and disaster recovery to Los Angeles businesses since 1999, from Woodland Hills.

Some of those relationships run decades. The Waverly School has been a client for 23 years. The Law Offices of Alan B. Snitzer has been a client for 18 years, covering email, servers, security and data storage. Planning horizons like that are the reason we think in years, not quarters.

Want a second pair of eyes on next year’s plan?

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