

THE BUSINESS LEADERS PLAYBOOK FOR

IT

A comprehensive guide for business leaders to build, manage and optimise their IT function for strategic advantage and operational excellence.

Presented by Leadership Services

www.leadership-services.co.uk

Table of Contents

1. Chapter 1: Introduction: Why IT Leadership Matters
2. Chapter 2: IT Strategy and Business Alignment
3. Chapter 3: IT Infrastructure Assessment
4. Chapter 4: Cybersecurity and Risk Management
5. Chapter 5: Cloud Strategy and Migration
6. Chapter 6: Digital Transformation
7. Chapter 7: IT Budget and Cost Management
8. Chapter 8: IT Team Structure and Development
9. Chapter 9: Vendor and Supplier Management
10. Chapter 10: Data Management and Governance
11. Chapter 11: IT Project Delivery
12. Chapter 12: Business Continuity and Disaster Recovery
13. Chapter 13: IT Service Management
14. Chapter 14: Software and Application Strategy
15. Chapter 15: Emerging Technology and Innovation
16. Chapter 16: When to Bring in an IT Director

Chapter 1: Introduction - Why IT Leadership Matters

Technology underpins every aspect of modern business. Yet many growing organisations treat IT as a cost centre rather than a strategic enabler. This playbook provides business leaders with the frameworks and tools needed to build, manage and optimise an IT function that drives competitive advantage. Without strategic IT leadership, businesses face security vulnerabilities, inefficient systems, missed digital opportunities, and escalating costs. A structured approach to IT leadership transforms technology from a necessary expense into a growth accelerator.

The Cost of Poor IT Leadership

Impact Area	Without Leadership	With Leadership
Security	Reactive to breaches, high risk	Proactive security posture, managed risk
Infrastructure	Ageing systems, frequent downtime	Modern, resilient, scalable architecture
Budget	Uncontrolled spending, no ROI visibility	Strategic investment with clear returns
Team	Skills gaps, high turnover	Developed team aligned to business goals
Strategy	Technology disconnected from business	IT as a strategic business enabler

 *Leadership Tip: If your IT team spends more than 70% of their time firefighting, you have a leadership problem, not a technical one.*

Chapter 2: IT Strategy and Business Alignment

An IT strategy is only valuable if it directly supports your business objectives. Too many IT strategies are written in isolation, focused on technology for its own sake rather than business outcomes. Alignment between IT and the business is the single most important factor in technology ROI.


IT Strategy Alignment Template

Business Objective	IT Initiative	Expected Outcome	Timeline	Investment
Increase revenue by 20%	Implement CRM system	Better lead tracking, 15% conversion improvement	Q2	25K
Reduce operational costs	Migrate to cloud infrastructure	30% reduction in hosting costs	Q3	15K
Improve customer experience	Launch customer portal	Self-service capability, reduced support calls	Q4	40K
Enable remote working	Deploy collaboration tools	Full remote capability for all staff	Q1	10K
Expand to new markets	E-commerce platform	Online sales channel generating 100K/year	Q2-Q3	35K

Technology Maturity Assessment

Area	Level 1: Basic	Level 2: Developing	Level 3: Established	Level 4: Advanced	Your Level
Infrastructure	On-premise only	Partial cloud	Hybrid cloud	Cloud-native	

Security	Basic antivirus	Firewall and backups	SIEM and monitoring	Zero trust architecture	
Data	Spreadsheets	Basic database	Data warehouse	AI and analytics	
Automation	Manual processes	Some automation	Workflow automation	AI-driven automation	
Support	Break-fix only	Helpdesk	ITIL processes	Proactive monitoring	

 *Leadership Tip: Start every IT initiative by asking: What business problem does this solve? If you cannot answer clearly, do not proceed.*

Chapter 3: IT Infrastructure Assessment

Your IT infrastructure is the foundation of your business operations. An outdated or poorly managed infrastructure leads to downtime, security risks, and lost productivity. Regular assessment ensures your infrastructure supports business growth rather than hindering it.

Infrastructure Audit Checklist

Component	Current State	Age	End of Life	Risk Level	Action Required
Servers					
Network Equipment					
Workstations/Laptops					
Storage Systems					
Backup Systems					
Phone System					
Internet Connectivity					
Wi-Fi Infrastructure					
Printers/Peripherals					

Network Performance Scorecard

Metric	Current	Target	Industry Standard
--------	---------	--------	-------------------

Uptime		99.9%	99.95%
Internet Speed		Adequate for needs	100Mbps+
Backup Success Rate		100%	99.9%
Recovery Time Objective		4 hours	Depends on criticality
Mean Time to Repair		Under 2 hours	Under 4 hours
Patch Compliance		95%+	99%

 *Leadership Tip: If you do not know the age and condition of every critical piece of IT infrastructure, you are managing risk blindly. Complete this audit today.*

Chapter 4: Cybersecurity and Risk Management

Cybersecurity is no longer just an IT issue - it is a business-critical risk that demands board-level attention. The average cost of a data breach for UK SMEs exceeds 30,000 pounds, with reputational damage often far exceeding the financial loss. A proactive security posture protects your business and builds customer trust.

Security Risk Assessment

Risk Area	Current Controls	Risk Level	Impact	Likelihood	Action Required
Phishing/E mail					
Ransomwar e					
Data Breach					
Insider Threat					
Supply Chain Attack					
Physical Security					
Mobile Device Risk					
Cloud Security					

Cyber Essentials Readiness Checklist

- Firewalls configured and actively managed
- Secure configuration for all devices
- User access control with least privilege principle
- Malware protection on all endpoints
- Patch management policy in place and enforced

- Multi-factor authentication enabled for all critical systems
- Regular security awareness training for all staff
- Incident response plan documented and tested
- Data backup strategy with offsite copies
- GDPR compliance verified and documented

 *Leadership Tip: Over 90% of successful cyber attacks start with a phishing email. Invest in regular security awareness training for every member of staff.*

Chapter 5: Cloud Strategy and Migration

Cloud computing has transformed how businesses consume and manage technology. Whether you are considering your first move to the cloud or optimising an existing cloud environment, a structured strategy ensures you maximise benefits while managing costs and risks.

Cloud Readiness Assessment

Application/System	Current Hosting	Cloud Suitability	Migration Complexity	Priority	Target Platform
Email					
File Storage					
ERP/Accounting					
CRM					
Website					
Line of Business App					
Database					
Backup					

Cloud Cost Comparison

Item	Current On-Premise Cost	Cloud Monthly Cost	Cloud Annual Cost	Saving/Cost
Server Hardware				
Software Licences				

IT Support Staff				
Power and Cooling				
Backup and DR				
Security Tools				
TOTAL				

 *Leadership Tip: Cloud migration is not an all-or-nothing decision. Start with low-risk workloads like email and file storage, prove the model, then migrate progressively.*

Chapter 6: Digital Transformation

Digital transformation is about using technology to fundamentally improve how your business operates and delivers value to customers. It is not about implementing technology for its own sake, but about solving business problems and creating competitive advantages through intelligent use of digital tools.

Digital Transformation Opportunity Map

Business Process	Current State	Pain Points	Digital Solution	Expected Benefit	Investment
Sales Process					
Customer Onboarding					
Order Fulfilment					
Financial Reporting					
HR and Recruitment					
Project Management					
Customer Support					
Marketing					

Automation Priority Matrix

Score each process on effort to automate (1-5) and business value of automation (1-5). Focus on high value, low effort opportunities first.

Process	Manual Hours/Week	Error Rate	Effort to Automate (1-5)	Business Value (1-5)	Priority Score
Invoice					

processing					
Report generation					
Data entry					
Email responses					
Scheduling					
Inventory updates					

 *Leadership Tip: Start digital transformation with quick wins that demonstrate value. Early successes build momentum and executive buy-in for larger initiatives.*

Chapter 7: IT Budget and Cost Management

Managing IT costs effectively requires visibility, planning, and alignment with business priorities. Many businesses either overspend on technology they do not need or underspend on critical infrastructure, creating risk. A structured approach to IT budgeting ensures every pound delivers value.

IT Budget Template

Category	Annual Budget	Monthly Budget	Actual Spend	Variance	Notes
Hardware					
Software Licences					
Cloud Services					
Telecommunications					
Security					
Support and Maintenance					
Staff and Training					
Projects and Development					
Consultancy					
Contingency (10%)					
TOTAL					

IT Spend Benchmarks

Company Size	IT Spend as % Revenue	Typical Annual IT Budget	Key Focus Areas
Under 1M revenue	3-5%	30-50K	Basic infrastructure, security, cloud
1-5M revenue	4-6%	40-300K	Cloud, automation, security, support
5-20M revenue	3-5%	150K-1M	Digital transformation, data, integration
20M+ revenue	3-6%	600K-5M+	Innovation, AI, enterprise systems

 *Leadership Tip: Track your IT cost per employee. The UK average for SMEs is 3,000-5,000 pounds per employee per year. If you are significantly above or below this, investigate why.*

Chapter 8: IT Team Structure and Development

Building the right IT team depends on your business size, complexity, and strategic ambitions. Most growing businesses need a mix of in-house capability and external expertise. Getting this balance right is critical to delivering reliable operations while driving innovation.


IT Team Structure by Business Size

Business Size	Recommended Structure	Key Roles	Estimated Annual Cost
Under 50 staff	Outsourced IT + Part-time IT Director	MSP, Fractional CTO/IT Director	20-50K
50-150 staff	Small in-house team + Part-time IT Director	IT Manager, Support Analyst, Fractional CTO	80-150K
150-500 staff	Full IT team	IT Director, Infrastructure Lead, Support Team, Security Analyst	200-500K
500+ staff	IT Department	CTO/CIO, IT Director, Team Leads, Specialists	500K+

IT Skills Gap Analysis

Skill Area	Current Capability (1-5)	Required Level (1-5)	Gap	Development Plan
Infrastructure Management				
Cybersecurity				
Cloud Computing				
Data and				

Analytics				
Software Development				
Project Management				
Service Desk				
Networking				

 *Leadership Tip: A part-time IT Director can bridge the gap between where your IT team is and where it needs to be. They bring strategic direction and mentoring without the cost of a full-time senior hire.*

Chapter 9: Vendor and Supplier Management

Most businesses rely on multiple IT vendors and suppliers. Managing these relationships effectively ensures you get the best value, service levels, and strategic support from your technology partners. Poor vendor management leads to overspending, lock-in, and service gaps.

Vendor Assessment Matrix

Vendor	Service Provided	Annual Cost	Contract End	SLA Met	Strategic Value	Risk if Lost	Rating

Vendor Consolidation Opportunities

- Review all current vendor contracts and identify overlapping services
- Assess total cost of ownership for each vendor relationship
- Evaluate whether consolidating vendors could reduce costs and complexity
- Check contract renewal dates and negotiate better terms proactively
- Ensure every vendor has a documented SLA with clear performance metrics
- Maintain a vendor register with key contacts and escalation procedures
- Review vendor security practices and ensure they meet your standards
- Plan exit strategies for every critical vendor relationship

 *Leadership Tip: Never let a critical vendor contract auto-renew without review. Set calendar reminders 90 days before every renewal date.*

Chapter 10: Data Management and Governance

Data is one of your most valuable business assets. Effective data management ensures your data is accurate, accessible, secure, and compliant with regulations. Poor data management leads to bad decisions, compliance risk, and missed opportunities for insight.

Data Governance Framework

Data Category	Owner	Storage Location	Backup Frequency	Retention Period	Access Controls	GDPR Relevant
Customer Data						
Financial Data						
Employee Data						
Product Data						
Marketing Data						
Operational Data						
Intellectual Property						

Data Quality Scorecard

Dimension	Definition	Current Score (1-10)	Target	Action
Accuracy	Data correctly represents reality		8+	

Completeness	All required data fields populated		9+	
Consistency	Same data across all systems		8+	
Timeliness	Data is current and up to date		9+	
Accessibility	Data is available to those who need it		8+	
Security	Data is protected from unauthorised access		9+	

 *Leadership Tip: Appoint a data owner for every critical dataset. If nobody owns the data, nobody is responsible for its quality.*

Chapter 11: IT Project Delivery

IT projects are notorious for overrunning on time and budget. A structured approach to project delivery, with clear governance and realistic planning, dramatically improves success rates. The key is proportionate governance that matches the scale and risk of each project.

Project Prioritisation Matrix

Project	Business Value (1-5)	Strategic Alignment (1-5)	Complexity (1-5)	Resource Required	Total Score	Priority

Project Status Dashboard

Project	Owner	Start Date	Due Date	Budget	Spent	Status	Risk Level

Project Success Factors

- Clear business case with measurable outcomes
- Executive sponsor with authority and engagement
- Realistic timeline with built-in contingency
- Defined scope with formal change control
- Regular steering committee meetings

- Risk register actively maintained
- User involvement throughout the project
- Post-implementation review to capture lessons learned

 *Leadership Tip: The number one reason IT projects fail is scope creep. Define what is in scope and what is not before the project starts, and enforce change control rigorously.*

Chapter 12: Business Continuity and Disaster Recovery

Every business needs a plan for when things go wrong. Whether it is a cyber attack, hardware failure, natural disaster, or human error, your ability to recover quickly determines the impact on your business. Most SMEs that suffer a major data loss without a recovery plan do not survive.


Business Impact Analysis

System/Process	Recovery Priority	Max Downtime Tolerable	Max Data Loss Tolerable	Recovery Method	Last Tested
Email	Critical	4 hours	1 hour	Cloud backup	
ERP/Accounting	Critical	4 hours	1 hour	Backup and restore	
Website	High	8 hours	24 hours	Hosting provider	
File Storage	High	4 hours	1 hour	Cloud sync	
Phone System	Medium	24 hours	N/A	Mobile fallback	
CRM	High	8 hours	4 hours	SaaS provider	
Custom Applications					

DR Test Schedule

Test Type	Frequency	Last Completed	Next Due	Result	Issues Found
Backup Verification	Monthly				
File Restore Test	Quarterly				

Full System Recovery	Annually				
Failover Test	Annually				
Incident Response Drill	Bi-annually				

 *Leadership Tip: A backup that has never been tested is not a backup - it is a hope. Test your recovery procedures at least quarterly.*

Chapter 13: IT Service Management


IT Service Management (ITSM) provides the framework for delivering IT services that meet business needs. Even for smaller businesses, adopting basic ITSM practices improves service quality, reduces downtime, and creates a better experience for your users.

IT Service Catalogue

Service	Description	Availability	SLA Response Time	SLA Resolution Time	Owner
Desktop Support	Hardware and software support	Mon-Fri 8am-6pm	1 hour	4 hours	
Network Access	Wi-Fi, VPN, connectivity	24/7	30 minutes	2 hours	
Email Support	Email setup and troubleshooting	Mon-Fri 8am-6pm	1 hour	4 hours	
New User Setup	Onboarding IT setup	Mon-Fri	24 hours	3 business days	
Security Incidents	Security breach response	24/7	15 minutes	Varies	
Software Requests	New software installation	Mon-Fri	4 hours	2 business days	
Hardware Procurement	New equipment ordering	Mon-Fri	24 hours	5-10 business days	

Incident Tracking Template

Ticket ID	Date	Reported By	Category	Priority	Status	Assigned To	Resolution
-----------	------	-------------	----------	----------	--------	-------------	------------

 *Leadership Tip: Track every IT request and incident, no matter how small. Patterns in support tickets reveal underlying problems that strategic investment can solve.*

Chapter 14: Software and Application Strategy


The software applications your business uses directly impact productivity, efficiency, and competitive advantage. A coherent application strategy reduces complexity, improves integration, and ensures you are getting value from every licence you pay for.

Application Portfolio Assessment

Application	Purpose	Users	Annual Cost	Business Critical	Integration	Satisfaction	Action

Software Rationalisation Checklist

- Audit all software licences and identify unused or underused applications
- Check for overlapping functionality between different tools
- Evaluate integration capabilities between core systems
- Review licence models for cost optimisation opportunities
- Assess whether bespoke applications could be replaced with SaaS alternatives
- Ensure all software is maintained and receiving security updates
- Document all critical application dependencies and data flows
- Plan migration paths for end-of-life applications

 *Leadership Tip: Most businesses are paying for 20-30% more software licences than they actually use. A licence audit typically pays for itself within the first month.*

Chapter 15: Emerging Technology and Innovation

Staying aware of emerging technologies ensures your business can identify opportunities early and avoid being disrupted by competitors who move faster. You do not need to adopt every new technology, but you do need a structured approach to evaluating and piloting innovations that could impact your business.

Technology Watch List


Technology	Relevance to Business	Potential Impact	Maturity Level	Investment Required	Timeline to Adopt
Artificial Intelligence/ ML					
Robotic Process Automation					
Internet of Things					
Blockchain					
Edge Computing					
Low-Code/No-Code Platforms					
Advanced Analytics					
Cybersecurity AI					

Innovation Evaluation Framework

For each technology under consideration, score these factors from 1-5:

- Business problem it solves - is there a clear use case?
- Strategic alignment - does it support business objectives?
- Cost to implement versus expected return

- Ease of integration with existing systems
- Team capability to adopt and manage
- Vendor maturity and market adoption
- Risk level and potential downsides
- Time to value - how quickly will we see results?

 *Leadership Tip: The best technology decisions are driven by business problems, not by the technology itself. Always start with the problem you are trying to solve.*

Chapter 16: When to Bring in an IT Director

This playbook has provided the frameworks and tools to manage your IT function. However, there comes a point where every growing business needs dedicated strategic IT leadership. Recognising that point is critical to maintaining momentum and managing risk.

Signs You Need an IT Director

- Your IT is reactive - constantly firefighting rather than planning
- You have experienced a security incident or near miss
- Your technology is holding back business growth
- You are planning a major project like cloud migration or system replacement
- IT costs are increasing but you cannot see clear value
- Your IT team lacks strategic direction and mentoring
- You are reliant on a single IT person with no succession plan
- Vendors are managing your technology strategy by default
- Board members are asking technology questions nobody can answer
- You are considering a major business change that depends on technology

The Part-Time IT Director Model

Factor	Full-Time Hire	Part-Time IT Director
Annual Cost	80-160K + benefits + recruitment fees	21-60K depending on days required
Time to Start	3-6 months recruitment process	Immediate - start within days
Experience Level	One background and perspective	Multiple sector and technology experience
Risk	High - long notice periods, redundancy costs	Low - flexible contracts, no long-term tie-in
Strategic Impact	Dependent on individual capability	Proven frameworks from multiple businesses
Team Development	Can mentor but one perspective	Brings best practice from across industries

Leadership Services provides experienced part-time IT Directors and fractional CTOs/CIOs who join your team and deliver transformative technology leadership from day one. Our IT Directors have a minimum of ten years senior experience and a proven track record of driving digital transformation and operational excellence.

Ready to Transform Your IT?

Contact Leadership Services today for a free, no-obligation conversation about how a part-time IT Director can accelerate your business growth.

- Call: 0330 236 8932
- Email: hello@leadership-services.co.uk
- Web: www.leadership-services.co.uk
- Book a call: calendly.com/d/ctvg-k3f-rqh/leadership-services-intro

Leadership Services

Transformative Leadership. Immediate Impact. No Risk.

www.leadership-services.co.uk

0330 236 8932

10 Watergate Row, Chester, CH1 2LD