FREE WORKSHEET

Who Owns Your Technology Function?

A self-assessment for leaders of small and mid-sized businesses (SMBs): 20 statements that show which technology decisions have a clear owner and which fall between the cracks.

INSIDE

20 statements in 7 areas · simple scoring and what your score means · two technology roles explained · an action plan

balancelogic.com · 301-396-8455

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HOW TO USE THIS WORKSHEET

Your IT is well managed. Your technology function still needs an owner.

Most growing businesses have good people handling technology: internal staff, an outside IT provider, software vendors, a cloud platform. The open question is rarely whether the work gets done. It's who is accountable for the decisions that tie it all to the business plan. This worksheet takes about 15 minutes. Mark each statement as it is today, not as it should be. If you can, have one or two other leaders fill it in too; different answers are useful information.

Owned
A named person or provider is accountable, it's written down, and it's reviewed on a schedule. Write their name in the last column. Can't name them? Mark Partly.

Partly
Someone handles it, but it isn't written down, isn't reviewed, or isn't connected to business goals.

No one
It happens by default, by whoever has time, or not at all. "I think the IT company does that" counts here.

The 20 statements

#	Strategy and budget	Owned	Partly	No one	Who owns it?
1	A written technology plan for the next 12 to 24 months exists, and it's tied to the business plan.	☐	☐	☐	
2	Technology spending is budgeted for the year ahead, not approved one purchase at a time.	☐	☐	☐	
3	A named person decides what technology to invest in next and can explain why to the leadership team.	☐	☐	☐	

#	Architecture and standards	Owned	Partly	No one	Who owns it?
4	There's a current map of your systems, how they connect, and where important data lives.	☐	☐	☐	
5	Standards for new tools (security, integration, who approves) are agreed before anything new is bought.	☐	☐	☐	
6	Someone checks that each new system fits what you already have, instead of adding another silo.	☐	☐	☐	

#	Vendors and contracts	Owned	Partly	No one	Who owns it?
7	One list shows every technology vendor, what you pay, the renewal date and the internal owner.	☐	☐	☐	
8	Contracts are reviewed before they renew, with a deliberate decision to keep, change or cancel.	☐	☐	☐	
9	When a problem crosses two or more providers, one person is accountable for getting it resolved.	☐	☐	☐	

#	Security and risk ownership	Owned	Partly	No one	Who owns it?
10	A leader is accountable for cybersecurity risk decisions, even when a provider does the hands-on security work.	☐	☐	☐	
11	The security requirements in your client contracts, insurance policy and industry rules are known, written down and assigned.	☐	☐	☐	
12	Backup, recovery and incident response plans are written down, and someone makes sure they're tested.	☐	☐	☐	

#	Data and AI	Owned	Partly	No one	Who owns it?
13	It's clear who owns each important set of data (clients, finance, HR, operations) and who may access it.	☐	☐	☐	
14	There's a written policy on which AI tools staff may use and what information they may put into them.	☐	☐	☐	
15	AI and automation ideas are judged against business goals and cost before anyone buys a tool.	☐	☐	☐	

#	Projects and change	Owned	Partly	No one	Who owns it?
16	Every technology project has a named owner, a budget, a timeline and an agreed definition of done.	☐	☐	☐	
17	When there are more technology ideas than time or money, someone sets the order and the business agrees to it.	☐	☐	☐	
18	Training and process changes are planned as part of each rollout, not left to the people using the new system.	☐	☐	☐	

#	Reporting to leadership	Owned	Partly	No one	Who owns it?
19	Leadership gets a regular technology update in business terms: cost, risk, progress and the next decisions needed.	☐	☐	☐	
20	Technology is a standing item on the leadership agenda, and the plan is reviewed against results at least once a year.	☐	☐	☐	

Score it

Give each **Owned** 2 points, each **Partly** 1 and each **No one** 0. Add up each area, then the total.

Area (statements)	Score	Out of	Area (statements)	Score	Out of
Strategy and budget (1 to 3)		6	Data and AI (13 to 15)		6
Architecture and standards (4 to 6)		6	Projects and change (16 to 18)		6
Vendors and contracts (7 to 9)		6	Reporting to leadership (19 to 20)		4
Security and risk ownership (10 to 12)		6	**Total**		**40**

Whatever your total: any area where you marked two or more statements No one is a priority. And if your leadership team scored the same statement very differently, that statement probably has no real owner yet.

What your score means

32–40	**Your technology function has an owner.** Decisions are made on purpose and connected to the business plan. Review any Partly answers, and re-score after a major change such as a new location or a key person leaving.
20–31	**Partly owned.** This is a common result. Day-to-day technology is usually in good hands, but planning, coordination and reporting fall between people. Each provider does its part well, and nobody is accountable for how the parts fit together. Start with your lowest-scoring area.
0–19	**No clear owner.** Technology decisions are being made by default: by whichever vendor calls, whoever has time, or the next urgent problem. That isn't a criticism of the people involved. It means the leadership role itself is empty, and filling it is the first step.

MANAGED SERVICE PROVIDER (MSP) AND MANAGED TECHNOLOGY PROVIDER (MTP)

MSP and MTP: two roles

An MSP manages technology. An MTP owns the technology function.

MSP: manages and protects your technology day to day (support, monitoring, maintenance, security operations and reliability). A good MSP is proactive.

MTP: is accountable for the technology function (strategy and roadmap, architecture, vendor coordination, AI and automation direction, and reporting to leadership).

A good MSP manages and protects your technology. An MTP makes sure it's planned, coordinated and aligned with the business. Owning the technology function and managing technology are complementary roles. "Own" means accountability, not doing every task: your current MSP, internal IT staff and vendors keep their roles. Not every business needs both, and some fill the ownership role with an internal leader. Many statements in this worksheet sit outside a typical managed IT agreement, so a low score usually means the ownership role is unfilled, not that your current provider is falling short.

Next steps

1. **Name an owner for every No one.** A temporary owner beats none. Write the name down and set a review date.
2. **Fix your lowest-scoring area first.** Agree on one change for the next 30 days, such as building the vendor list or writing an AI use policy.
3. **Ask your current IT provider which statements their agreement covers.** That shows which decisions are theirs and which belong to a leadership role.
4. **Decide how to fill the leadership role:** an internal leader, a fractional CIO or CISO, or a managed technology provider. Then score again in six months and compare.

Your action plan

List your biggest ownership gaps, starting with any area that has two or more No one answers. Keep this page with your completed worksheet.

Gap (statement #)	Who will own it	First step	By when

Questions to settle with your leadership team

Who is accountable for the technology plan today, and does everyone agree on the answer?

Which decisions sit outside your current IT provider's agreement, and who will make them?

Date of your next self-assessment: _____

Want help reading your results?

We own the technology function for SMBs. That means accountability for the plan, the standards and how your providers fit together, alongside the people who already manage your technology.

Book a free IT Strategy Session. Bring your completed worksheet and we'll go through your lowest-scoring areas with you.

balancelogic.com/contact-us · 301-396-8455 · 3825 Leonardtown Road, Suite 5, Waldorf, MD 20601