

# Annual IT Budget Planning Template

A structured framework to forecast, track, and optimize your IT spend.

Use this template to build a comprehensive IT budget. Fill in estimated and actual costs for each category. Adjust line items to fit your organization's needs.

## HARDWARE & INFRASTRUCTURE

### Workstations & Laptops

New purchases, replacements, and refresh cycles. Include monitors, docking stations, peripherals.

### Servers & Networking

On-premises servers, switches, routers, access points, UPS units, rack equipment.

### Printers & Peripherals

Printers, scanners, specialty devices. Include maintenance contracts and supplies.

## SOFTWARE & LICENSING

### Productivity Suite

Microsoft 365, Google Workspace, or equivalent. Per-user licensing costs.

### Line-of-Business Applications

ERP, CRM, accounting, project management, and industry-specific software.

### Security Software

EDR, email security, backup software, password managers, SIEM/SOC subscriptions.

## CLOUD SERVICES

### Cloud Infrastructure (IaaS)

Azure, AWS, or GCP compute, storage, and networking costs.

### SaaS Applications

All cloud-hosted applications not covered in other categories.

### Cloud Backup & DR

Disaster recovery as a service, cloud backup storage, replication costs.

## SECURITY & COMPLIANCE

### Managed Security Services

SOC monitoring, managed detection & response, threat intelligence feeds.

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### Compliance & Auditing

SOC 2 audits, penetration testing, vulnerability scanning, compliance consulting.

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### Cyber Insurance

Annual premium for cyber liability and data breach coverage.

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## SUPPORT & PROFESSIONAL SERVICES

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### Managed IT Services

Monthly managed services contract, help desk, remote monitoring & management.

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### Projects & Consulting

Network upgrades, migrations, new deployments, and strategic consulting.

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## CONTINGENCY & INNOVATION

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### Emergency Reserve (10-15%)

Buffer for unexpected failures, emergency replacements, and unplanned projects.

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### Innovation & R&D

AI tools, automation initiatives, proof-of-concept projects, training & certifications.

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