SERVICE REVIEWS & PLANNING

Quarterly IT review workbook

Use at an agreed quarterly review or adapt to your service cadence. Bring current records, decide what matters and leave with named owners and review dates rather than an unassigned list.

Organisation / reference	Owner / role	Date / review

CHECK TOGETHER. RECORD THE GAPS.

- [ ] **Confirm the service scope**
  Review included systems, responsibilities, contacts and changes since the last meeting.
- [ ] **Review the work**
  Discuss recurring faults, open requests and delays with their business impact and dependencies.
- [ ] **Check the technology lifecycle**
  Review supported software, ageing equipment, licences and upcoming renewals.
- [ ] **Review security actions**
  Discuss access reviews, patch gaps, monitoring coverage and unresolved risks using available evidence.
- [ ] **Review recovery evidence**
  Check restore exercises, remaining dependencies and recovery objectives with business owners.
- [ ] **Plan the next changes**
  Discuss staff changes, new sites, suppliers and projects; confirm approvals and cost dependencies.
- [ ] **Own the next steps**
  Assign each agreed action to an owner, target date and review point. Record deferred decisions.

Ticked boxes record your review; they do not certify compliance. Do not enter passwords, recovery codes or private configuration here.

DECISIONS, ACTIONS & EVIDENCE

Make the next step clear.

Complete locally in a PDF reader or print for a discussion. Keep the completed copy in your approved private record system.

Review context

Meeting date, participants, period reviewed and material scope changes.

Issues and evidence

Recurring issues, lifecycle risks and references to private security or recovery records.

Decisions and priorities

Agreed changes, deferred decisions, dependencies and approvals still needed.

Action register

Action, owner, target date, next review and completion evidence.

RELATED POLICY / GUIDANCE

Service governance

Technology lifecycle

Logging & monitoring

ASD/ACSC: Engaging a managed service provider