

Build a clearer IT budget brief

Put people, recurring services, equipment and business priorities into one useful planning conversation.

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BEFORE YOU START

Gather current contracts, recent invoices, equipment records and expected headcount changes. Use an internal worksheet; do not share account credentials or payment-card details.

01 Establish the current baseline

List services by purpose, owner, quantity and renewal date. Separate monthly billing from the underlying contract commitment, and identify once-off work that is not part of a recurring support fee.

Record all amounts in ZAR on a consistent VAT basis. Keep excl. VAT, VAT and incl. VAT separate; ask the supplier to clarify mixed or uncertain amounts before comparing proposals.

02 Connect spending to business needs

List planned starters, offices, projects and equipment replacements. Consider support, connectivity, identity, security, backups and staff training alongside licences and hardware.

Ask each owner which disruption or constraint matters most and why. Prioritise the work with agreed business impact, rather than treating every product feature as equally necessary.

03 Build options for review

Prepare a maintain-current-work option and a planned-improvement option using written supplier quotes. Identify quantities, minimum terms, implementation charges, exclusions and cancellation conditions.

Separate estimates from approved amounts. Assign an owner to each renewal, document assumptions and schedule a regular review of actual spending, unused services and changed requirements.

Your practical checklist

Build a clearer IT budget brief

- ☐ Current services, owners and renewal dates listed
- ☐ Billing frequency and commitment terms separated
- ☐ ZAR and VAT basis made consistent
- ☐ People, projects and replacement needs included
- ☐ Written quotes and exclusions checked
- ☐ Assumptions, approvals and next review recorded

Record the next action

Planning period / headcount / main business priorities

Recurring baseline / once-off projects / VAT basis

Missing quote, owner and decision date

This is a planning worksheet, not a quotation or accounting advice. Prices, tax treatment and service scope must be confirmed in the applicable supplier agreement and with your finance adviser.

OFFICIAL SOURCES & FURTHER READING

NIST: Cybersecurity Framework small business guide

Links open the official source. Web edition: compurep.co.za/guides/it-budget-planning