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IT Alignment Self-Assessment *Worksheet*

A sourcing-agnostic tool for diagnosing whether your technology and business are governed as one structure, or merely talking to each other.

How to use this worksheet

Business-IT alignment is a governance problem, not a communication problem. This worksheet helps you locate it by examining decision rights, accountability, and measurement, rather than how the relationship "feels."

Run it with two people: one IT leader (CIO, IT director, or equivalent) and one business stakeholder (CEO, COO, or a business-unit owner). Score independently first, then compare. The gap between the two scores is often more revealing than either score alone — it shows where the two sides quietly believe different things.

For each statement, score how true it is today using the 4-stage key below. Be honest about the current state, not the aspiration. Reliability is not alignment; a team can execute flawlessly on the wrong priorities.

It takes about 30-40 minutes per person. Don't fill it out together on the first pass, that defeats the perception-gap analysis at the end.

Scoring key (4 stages)

Score	Stage	What it means
1	Reactive	Ad hoc, incident-driven. No defined structure for this. Happens by who shouts loudest.
2	Functional	Works reliably within IT's own domain, but IT operates as an order-taker. Defined informally at best.
3	Aligned	Defined decision rights and a shared process govern this. Mapped to business objectives.
4	Strategic	Business and technology decisions are formed together. This is owned as a joint discipline.

Mark N/A only if a statement genuinely cannot apply to your organization. N/A items are excluded from the average.

Dimension 1 — Governance & Decision Rights (12 statements)

Who decides what, who is consulted, and who is merely informed.

#	Statement	Score (1-4)
1.1	For each class of technology decision, it is documented who decides, who is consulted, and who is informed.	☐
1.2	Business units cannot sign technology/SaaS contracts without IT being a defined participant.	☐
1.3	IT cannot replace or retire a business-critical system without business sign-off.	☐
1.4	Significant technology decisions do not require an executive to personally push them to move.	☐
1.5	There is a standing body (steering committee or equivalent) with real authority to allocate technology priority.	☐
1.6	That body is chaired by a business executive, not by IT.	☐
1.7	Decision rights are written down and survive a change of personnel.	☐
1.8	When a “gray zone” decision appears, there is a defined way to resolve who owns it.	☐
1.9	Technology decisions rarely surface as surprises to either side.	☐
1.10	Emergency/exception decisions follow a known process rather than improvisation.	☐
1.11	The CEO or COO (not the CIO alone) is accountable for the alignment structure itself.	☐
1.12	New initiatives enter through a known intake process rather than side channels.	☐
	Dimension 1 average (sum ÷ scored items)	☐

Dimension 2 — Investment-to-Outcome Mapping (10 statements)

Whether money connects to named business results.

#	Statement	Score (1-4)
2.1	Every significant technology investment names the business outcome it is meant to move.	☐
2.2	That outcome is a business result (e.g., cycle-time, revenue, risk), not a technical deliverable.	☐
2.3	Each major initiative has a named business owner, separate from the technical lead.	☐
2.4	The IT budget is defended on outcomes, not on “keeping the lights on.”	☐
2.5	Funding decisions ask “what will this change?” not only “can we afford it?”	☐
2.6	Initiatives that can’t be tied to a business outcome get challenged, not auto-approved.	☐
2.7	Technology spend is reviewed as a portfolio, not as isolated line items.	☐
2.8	There is a defined process for retiring or de-funding investments that stop delivering.	☐
2.9	Business owners feel accountable for the ROI of technology they sponsored.	☐
2.10	Cost reduction and outcome creation are tracked as distinct goals, not conflated.	☐
	Dimension 2 average (sum ÷ scored items)	☐

Dimension 3 — Shared Metrics & Accountability (10 statements)

Whether both sides measure the same reality and someone owns the result.

#	Statement	Score (1-4)
3.1	Business and IT look at the same metrics when judging whether technology is delivering.	☐
3.2	When something fails, post-mortems focus on missing process/controls, not on blame.	☐
3.3	For every major technology outcome, a specific person's performance is affected by it.	☐
3.4	We measure business outcomes, not just project outputs (on-time / on-budget).	☐
3.5	"The system is failing" vs. "uptime is 99.9%" disputes are rare because metrics are reconciled.	☐
3.6	Service/performance targets are tied to business impact, not just technical thresholds.	☐
3.7	Accountability for an outcome does not disappear when a project closes.	☐
3.8	Metrics are reviewed on a regular cadence by both business and IT together.	☐
3.9	A failed initiative has a clearly accountable owner, not a diffuse "the team."	☐
3.10	Reporting is built around business questions, not just technical dashboards.	☐
	Dimension 3 average (sum ÷ scored items)	☐

Dimension 4 — Strategic Visibility (8 statements)

Whether technology shapes strategy or only reacts to it.

#	Statement	Score (1-4)
4.1	Technology is planned alongside business strategy, not after it's finalized.	☐
4.2	The senior technology leader participates in business strategy formation.	☐
4.3	Business leaders can articulate what technology capabilities unlock competitive advantage.	☐
4.4	Technology raises options the business wouldn't otherwise have considered.	☐
4.5	Roadmaps are an output of governance, not a substitute for decision rights.	☐
4.6	The line between "an IT decision" and "a business decision" is genuinely blurred for strategic moves.	☐
4.7	Long-range (18-24 month) technology direction is jointly owned.	☐
4.8	Shadow IT is rare because the approved path serves business needs quickly enough.	☐
	Dimension 4 average (sum ÷ scored items)	☐

Dimension 5 — Sourcing Fit (8 statements)

Whether your governance works regardless of in-house, co-managed, or outsourced delivery.

#	Statement	Score (1-4)
5.1	Decision rights are clear enough that any sourcing model would work within them.	☐
5.2	Provider relationships (if any) are governed by outcomes, not just ticket volume.	☐
5.3	Contracts/SLAs encode decision rights and accountability, not only response times.	☐
5.4	No provider is treated as a substitute for internal governance.	☐
5.5	We could change sourcing models without re-litigating who decides what.	☐
5.6	Co-managed boundaries (who owns which decision) are explicitly documented.	☐
5.7	We can evaluate a partner against outcome standards, the same ones we'd apply internally.	☐
5.8	Switching or adding a provider would not create lock-in over governance itself.	☐
	Dimension 5 average (sum ÷ scored items)	☐

Misalignment symptom checklist (15 red flags)

Check every one you've observed in the last 6 months. These are behavioral, not attitudinal, the more boxes checked, the stronger the structural problem.

- [ ] A business unit signed a technology/SaaS contract IT learned about at implementation.
- [ ] IT replaced or changed a core system the business learned about at rollout.
- [ ] The IT budget is justified primarily as "what it takes to keep things running."
- [ ] Nothing significant moves without an executive personally championing it.
- [ ] Business says a system is failing while IT reports it's healthy (different metrics).
- [ ] Departments routinely route around official IT channels (shadow IT).
- [ ] Post-mortems center on whose fault it was rather than what control was missing.
- [ ] No one's performance is actually affected when a technology investment fails.
- [ ] Major initiatives have a technical lead but no named business owner.
- [ ] Projects are judged "successful" on delivery even when the business metric didn't move.
- [ ] Priorities get set by whoever escalates loudest, not by a standing process.
- [ ] The "technology roadmap" exists but is regularly overridden or ignored.
- [ ] IT is held accountable for outcomes it was never given authority to shape.
- [ ] Recurring alignment meetings happen, yet the same disconnects persist quarter to quarter.
- [ ] Who decides a given class of technology decision is genuinely unclear or disputed.

Symptoms checked _____ / 15

Score interpretation bands

Compute your overall average across all scored statements (Dimensions 1-5).

Overall average	Stage	What it means	Primary first move
1.0 - 1.7	Reactive	Decisions are incident-driven; technology is a cost center.	Write down who owns each class of decision; stop deciding by who shouts loudest.
1.8 - 2.5	Functional	IT is reliable but an order-taker. Easily mistaken for “aligned.”	Convert project-by-project negotiation into a standing prioritization process with defined decision rights.
2.6 - 3.3	Aligned	Defined decision rights and shared prioritization govern most choices.	Push from output-tracking to outcome-tracking; tighten business ownership of investments.
3.4 - 4.0	Strategic	Business and technology strategy are formed together.	Sustain the governance body; treat the portfolio as a source of competitive advantage.

Reality check: Most mid-sized companies score in the Functional band while believing they’re Aligned, because IT is reliable and the relationship is friendly. Reliability is not alignment. Score honestly, then read the symptom checklist, three or more red flags almost always means you’re a band lower than your number suggests.

You don’t skip stages. Each band’s first move builds the governance muscle the next one depends on.

Perception-gap analysis

Transfer each person’s dimension averages here and compute the gap. The gap is the finding. A large gap means the two sides hold different beliefs about the same structure, which is itself a governance problem.

Dimension	IT leader avg	Business stakeholder avg	Gap (absolute)
1 — Governance & Decision Rights			
2 — Investment-to-Outcome			
3 — Shared Metrics & Accountability			
4 — Strategic Visibility			
5 — Sourcing Fit			
Overall			

How to read it:

- Gap of 0.0 - 0.4: Shared understanding. Your scores describe a real, agreed state.
- Gap of 0.5 - 0.9: Meaningful divergence. Discuss the specific statements that differed most.

- Gap of 1.0+: Significant misperception. One side believes a structure exists that the other doesn't experience, often the clearest sign that decision rights are undefined.

Largest single-statement disagreement(s):

What that disagreement reveals about decision rights or accountability:

First-90-days actions

Don't apply stage-three solutions to a stage-two problem. Start where you actually scored.

Days 1-30 — Inventory (everyone, regardless of stage)

- [ ] Take your last 10 significant technology decisions. For each, record: who decided, who should have decided, who was accountable for the outcome, and whether anyone actually was.
- [ ] Mark each decision where the rights were undefined or accountability evaporated.
- [ ] Run this worksheet with one IT leader and one business stakeholder; complete the perception-gap analysis.

Days 31-60 — Assign

- [ ] Assign each ambiguous decision right identified above to a named role.
- [ ] Attach each in-flight major investment to a named business owner and a named business outcome.
- [ ] Pick the single highest-impact red flag from the symptom checklist and design the process fix for it.

Days 61-90 — Structure

- [ ] Stand up (or charter) a small steering body chaired by a business executive with authority to allocate priority and funding.
- [ ] Reconcile the conflicting metrics from Dimension 3 so business and IT measure the same reality.
- [ ] Schedule the first quarterly re-score (below) and assign an owner for it.

Quarterly re-score tracker

Re-run the assessment each quarter. Trend matters more than any single number, and the perception gap closing is often the first sign governance is taking hold.

Quarter	D 1	D 2	D 3	D 4	D 5	Overall avg	Stage	Symptoms /15	Gap (overall)
Baseline									
Q+1									
Q+2									
Q+3									
Q+4									

Notes / what changed this quarter:

Remember: Alignment is a structure you build, not a relationship you nurture. Better conversations are a side effect of good governance, never a substitute for it.

Not Sure Where Your IT Alignment Actually Stands?

Plow helps IT leaders diagnose and close governance gaps between technology and the business.

Talk to Our Advisory Team →