

# Mid-Year IT Efficiency Audit Template

This Mid-Year IT Efficiency Audit Template is designed to help you take a focused look at how your teams, tools, and processes are performing. Use it to identify what's working, uncover areas for improvement, and refine how you allocate resources for better results in the second half of the year.

## STEP 1 Schedule Your Review Meeting

**Meeting Participants:** IT Leadership, PMO, Technical Leads

**Duration:** 90 minutes

**Agenda:**

- Review Q1 & Q2 performance metrics
- Identify wins, gaps, and risks
- Align on 2–3 key areas for improvement



## STEP 2 Review Key Metrics

Use objective data to assess how well your IT department has been performing. Key metrics to review include:

METRIC	ACTION / DATA TO REVIEW
Uptime/System Reliability	Current uptime percentage vs. target
Ticket Volume & Resolution Time	Volume of support tickets and average resolution time
Project Milestones Hit vs. Planned	Compare actual project delivery dates with planned milestones
Budget vs. Actual IT Spend	Compare your IT budget to actual spend
Employee Sentiment/Turnover/Burnout Markers	Review team morale, burnout, and employee turnover rates

## STEP 3 Identify 2–3 Target Areas for Improvement

Target improvement in three pillars: Tech, Talent, and Process

TECH	TALENT	PROCESS
<ul style="list-style-type: none"> <li>• Are your tools underutilized?</li> <li>• Could automation reduce manual work?</li> </ul>	<ul style="list-style-type: none"> <li>• Are your best employees overburdened with low-value tasks?</li> <li>• Is there a need for role rebalancing?</li> </ul>	<ul style="list-style-type: none"> <li>• Are workflows inefficient?</li> <li>• Are approvals or handoffs slowing down projects?</li> </ul>

## STEP 4 Create Action Plans for Each Area

For each identified target area, define the following:

**GOAL:** Clear and measurable outcomes (e.g., "Reduce ticket backlog by 30% by Q4")

**OWNER:** Designate the person accountable for execution

**MILESTONES:** Define smaller goals to track progress (e.g., "Deploy self-service tool by September")

**SUPPORT NEEDED:** Specify the resources required (e.g., budget, vendor support)

## STEP 5 Communicate & Track Progress

### COMMUNICATION PLAN:

Share the action plan with all stakeholders and schedule weekly check-ins to track progress

### TRACKING:

Utilize dashboards or project management tools to monitor milestones and outcomes

(Sample H2 IT Efficiency Plan Snapshot)

AREA	GOAL	OWNER	MILESTONE	SUPPORT REQ.
Talent	Reduce engineer burnout by 25%	Director of IT Op	Rotate on-call + add temp support by Aug	MCPC Staffing
Tech	Automate password resets	Infrastructure Lead	Deploy self-service tool by Sept	Existing tool license
Process	Improve project status visibility	PMO Lead	Roll our Kanban board to all squads	Internal training + playbook



## NEXT STEPS

**NEED ASSISTANCE?** Reach out to MCPC to help execute your action plan.

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